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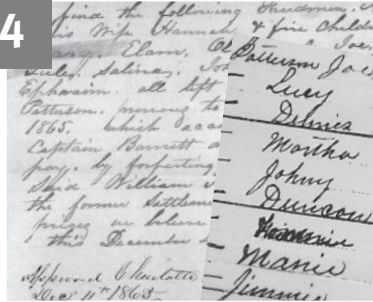
Courtesy of Syracuse University Archives.

## Telling the Stories

After thirty-five Syracuse University students lost their lives in the bombing of Pan Am Flight 103 over Lockerbie, Scotland, in 1988, the school made a commitment to remember them, as well as the other passengers, through an archives.

**Cara A. Howe**

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Courtesy of the Patterson Family Papers, Collection 341, University of North Carolina-Charlotte.

## A Slave Called Joe

Archivist Robert A. McInnes embarked on a quest to learn more about a slave called Joe in 2005. Though he didn't know it at the time, the quest would take him on a years-long journey illuminating the lives of Joe and his relatives.

**Robert A. McInnes**

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Courtesy of Knowledge Alliance.

## Diversifying the Library and Information Science Profession

American Library Association's Knowledge Alliance program highlights the need for diversity within the library and information science profession, enhances recruiters' advocacy skills, and builds community among professionals.

**Steven D. Booth, Holly Smith, Hannah Lee, and Deena Smith**

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**Power to the People:** Farm workers in Pueblo, Colorado, on strike, from the papers of the Louis "Lugs" Garcia family, who worked to improve the living conditions for families in the predominantly Chicano neighborhood of Salt Creek. The papers are part of the archives at Colorado State University-Pueblo. University Archivist Beverly Allen writes about how the Colorado Chicano Movement Archives was established and gives advice on working with community members in "Power to the People" on page 6.



## PRESIDENT'S MESSAGE

**Kathleen Roe**

kathleen.d.roe@gmail.com

# A Year of Living Dangerously for Archives

It's really pretty simple. Archives change lives . . . sometimes in breathtaking ways, sometimes in quiet but essential ways. Nonetheless, every encounter that a user has with archives results in some increase or change in knowledge, some adjustment to a direction, some altered perspective, some affecting of the human experience. Archives have value for so many different people—our managers, our colleagues, our friends, the public, our users, potential users, and even people who may never directly use them.

I hope in the coming year we can work together to take some specific actions to raise awareness of the importance and value of archives in our lives, our organizations, our government, and our society. In my incoming presidential remarks at the recent Annual Business Meeting (<http://www2.archivists.org/history/leaders/kathleen-roe/incoming-presidential-remarks-the-year-of-living-dangerously-for-archives>), I issued a challenge to us as SAA members, as archivists, to spend a year “living dangerously” by taking some concerted actions to increase awareness of and advocate for archives. It's not something that most of us have been trained to do, and it is something that, for many of us, is a bit beyond our comfort zone (hence the element of “danger”).

This challenge to take action draws on the increasing interest and energy that has been growing among you, our members and colleagues, around the idea that we as a profession need to step forward to raise awareness of the importance and value of archives and the critical role of archivists who make these incomparable resources available. We have the Committee on Public Awareness, the Committee on Advocacy and Public Policy, and groups like the Issues and Advocacy Roundtable, the Congressional Papers Roundtable, the Business Archives Section, and others who are dedicated to moving forward in awareness and advocacy. But each of us can do *something to contribute to our collective success*. Many voices will strengthen our ability to make a difference.

Every month or so during the coming year, we will put forward “challenge” opportunities for you to consider, and we hope to spur ideas that will help you promote the value of archives. At <http://www2.archivists.org/living-dangerously> you can find the current challenge, links to additional information to help you formulate ideas, and (soon I hope!) information on what actions others have done as their “commitment to awareness and advocacy for archives.”

Although we cannot predict challenges in federal funding, closure of archives, or key legislation at the national or state levels, as issues develop where advocacy from the archival community is important, we'll alert you to those as well. We will provide you with support materials, examples, and contact information so you can write letters or make phone calls or onsite visits to advocate for important archival concerns.

We want to measure and track what we are able to accomplish in the next year, and we'll acknowledge and celebrate those efforts at the end of the Year of Living Dangerously for Archives. The SAA staff have developed some simple online reporting forms, and we are enlisting a group of volunteers to help gather and aggregate all of the many ways you contribute to the awareness and advocacy effort.

Archives matter. Let's take the next year to work together to draw attention to the essential role that archives and archivists play in the lives of individuals, our communities, and our nation. We can make a difference—I look forward to the journey with you! ■

## ARCHIVAL OUTLOOK



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American  
Archivists**

The Society of American Archivists serves the education and information needs of its members and provides leadership to help ensure the identification, preservation, and use of the nation's historical record.

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# TELLING THE STORIES

## *The Pan Am Flight 103 Story Archives Project*

**Cara A. Howe, Syracuse University Archives**

On December 21, 1988, a Pan American Airways Boeing 747 was en route from London's Heathrow Airport to the John F. Kennedy Airport in New York City when a Semtex plastic explosive, hidden in a Toshiba radio cassette player in the forward cargo hold, detonated at 31,000 feet. In less than three minutes, 270 men, women, and children lost their lives over the small town of Lockerbie, Scotland.

On board the plane were thirty-five students who had spent the semester studying abroad through Syracuse University. The university community was devastated, but remained committed to remembering the students who were killed. In 1990 the Pan Am Flight 103/Lockerbie Air Disaster Archives was established and dedicated to the memory of the thirty-five students. In the years since, we have expanded the archives to include material on all facets of the disaster, from the coordinated investigation between US and UK agencies, the changes to airline security, and the art and literature inspired by the event, to the lives of the victims and their loved ones' campaign for justice. Also included is information on the indictments and the international trial of two Libyans—one of whom was eventually convicted of the mass murder of 270 people.

### Launching the Project

To commemorate the twenty-fifth anniversary of the bombing, the archives launched "Telling the Stories: The Pan Am

Flight 103 Story Archives Project" in an effort to fully document the disaster and its aftermath. The project focuses on gathering oral history interviews with individuals who have personal knowledge of Pan Am 103. These stories include memories of the people who lost their lives in the bombing; the days immediately following the disaster; the effect the bombing had on individuals, local communities, and nations; and how the tragedy has shaped the world we live in today.

The purpose of the project was to allow those who were affected by this tragedy to tell the story as they remember it. The power of the spoken word is often missing from the archival record, and the Pan Am 103/Lockerbie Air Disaster Archives was no different. It became clear that certain individuals were very vocal, and consequently their experiences and viewpoints dominated the mainstream media's reporting of the disaster. We hoped that "Telling the Stories" would provide an outlet for those who never had the chance to share their thoughts. After twenty-five years, the window of opportunity to connect with individuals affected by the tragedy was quickly closing, so we decided to capitalize on a trip the archives staff was taking to gather materials in the United Kingdom.

### Completing the Interviews

We were overwhelmed by the response we received, especially from Police Scotland District V (formerly the Dumfries and

Galloway Constabulary), which had spearheaded the search and rescue efforts and ultimately the massive international investigation that led to the conviction of the Libyan intelligence agent in 2001. We interviewed twenty-seven people during our trip, many of whom were police officers and first responders who faced a disaster of an unprecedented scale.

We decided to use video to record the interviews—not only did we feel that this was feasible, but also that the facial expressions and body language imparted during the interviews would enhance the

**Continued on page 31 >**



Assistant Archivist Cara Howe talks to retired Chief Constable John Boyd before his oral history interview conducted in Dumfries, Scotland, on September 12, 2013.



## Robert A. McInnes, Charlotte Christian College and Theological Seminary

This research doesn't concern recent events. The investigation started in 2005, not long after I began working as a manuscripts librarian at the University of North Carolina (UNC) Charlotte. The director of the UNC Charlotte Special Collections, Robin Brabham, handed me a manuscript collection he had accessioned a year earlier. The collection's materials primarily concerned the Patterson family of northern Mecklenburg County, North Carolina, where they had settled in the latter part of the 1700s. What I didn't know then was that this collection would lead me on a years-long journey that would connect the past with the present.

### The Patterson Family

John Patterson was an immigrant from County Antrim, in the northern part of Ireland, and soon after his arrival in 1789 in the central Piedmont region of North Carolina, he purchased several acres of land and a number of slaves—two important status symbols at that time and place. John had nine children, including a son named William, born in 1806. William married Elizabeth McEwen Potts in 1828. When her father James died, he formally deeded a slave named Joe to the William Patterson family.

Joe's name appeared four times in the manuscript collection, which may seem insignificant, but considering that Joe is part of a disenfranchised population

from more than 150 years ago, this is actually substantial. Intrigued, I decided to investigate the life of this man further. I started by scanning each of the documents that bore his name and placed them in chronological order. In doing so, I found that I could—to some extent—document his life.

### Discovering Joe

Joe was first mentioned in 1828 in his master's will, when he was bequeathed to William and Elizabeth Patterson.

Joe's name next appears in a contract dated November 24, 1853, when he and another slave named Lucy were rented out in order to earn money for their master. The lease contract spelled out in detail the terms of the lease and the clothes that the leaser was to provide for these slaves.

Joe's name is listed on a receipt for the payment of \$10 for medical services rendered to him by Dr. G.W. Caldwell. The receipt says "the 25th of 1862," but does not include the month.

The Patterson family papers register Joe's name for a final time on December 11, 1865, on a document indicating that Joe was not among those freed men who agreed to remain on the Patterson plantation through the fall harvest. After emancipation in the spring of 1865, William Patterson made an offer to his former slaves that

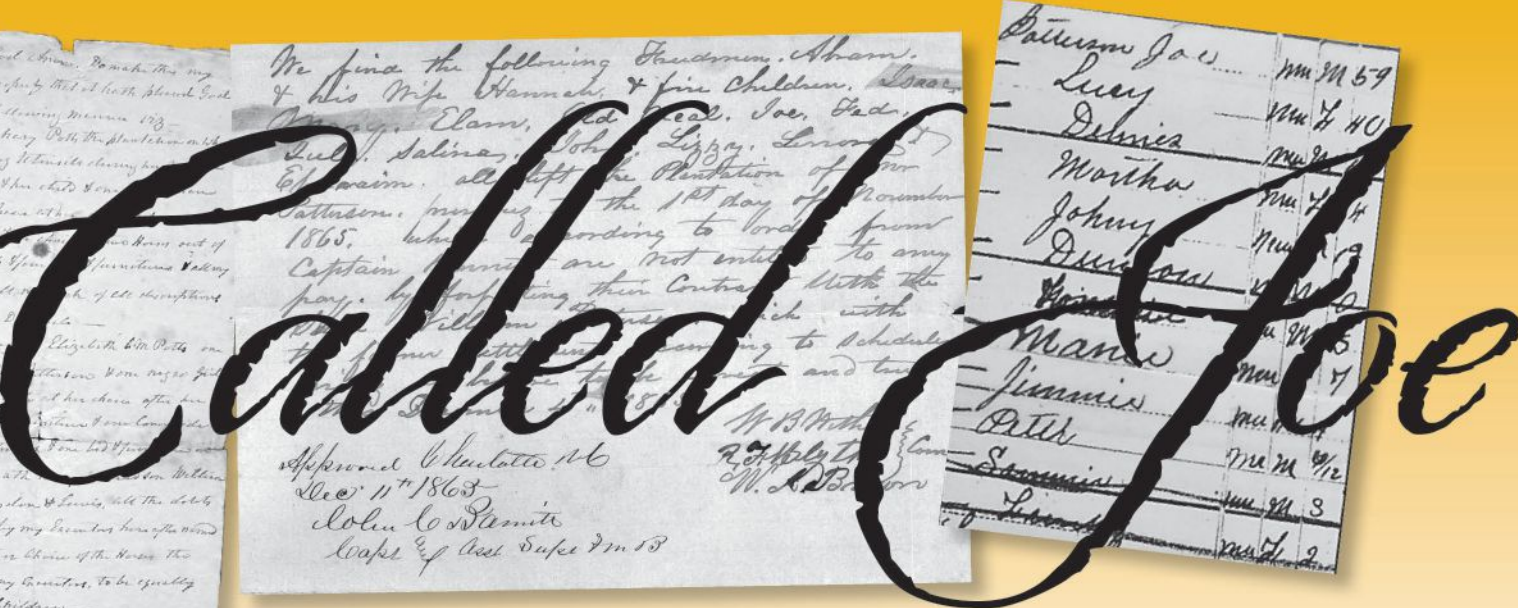
if they agreed to stay on the plantation through the fall harvest, he would pay them the standard wage for their work. Though some of these freedmen did stay, Joe decided to leave and relocate elsewhere. Joe may have chosen wisely to leave at that time, since William Patterson began billing the freed men for room and board as long as they remained on the plantation, and some of these freed men and women became indebted to Patterson for those expenses, according to further documentation in the collection.

With this information, I compiled a PowerPoint on the life and times of Joe, mixing in a great deal of historical context with Joe's story. I delivered a presentation to an audience of peers at Atkins Library in 2006. Several asked what happened to Joe following emancipation. Where did he go? And so my investigation continued.

### Joe's Descendants

Consulting the 1880 census, I found a Joe Patterson who lived in Richmond County, North Carolina (several miles east of Mecklenburg County), and was listed as a mulatto. The census also revealed that he was fifty-nine years old in 1880 (making his birth year 1821), he worked as a farmer, he married a woman named Lucy (remember the slave lease contract in 1853), and had ten children with her.





**Previous Page:** Two documents bearing the name Joe (later Joe Patterson), a slave owned by the Patterson family. **Left:** The will of James Potts, 1828. **Above:** Joe Patterson's emancipation document, 1865. **Right:** 1880 census record. Courtesy of the Patterson Family Papers, Collection 341, University of North Carolina–Charlotte, Atkins Library, Special Collections. Scans made by the author.

Details about Joe's children were vague. Close examination of the census microfilm showed that the names of some of his children were crossed out—implying that they probably died very young. In an effort to find out more about Joe's descendants, I followed the few leads provided. One of Joe's sons was Peter, born in either late 1879 or early 1880. Through more research in US census records, I was able to determine that he

lived to adulthood, married a woman named Violet, and moved from Richmond County to neighboring Robeson County. The couple had fifteen children, including one named Frank.

### Meeting the Pattersons

At this point, I was approaching the end of available census records, since the Census Bureau only releases them after seventy

years. I relied on the help of a friend, Marilyn Davis of Connecticut, who's an expert genealogist and member of the Daughters of the American Revolution, which has an application process that requires in-depth genealogical research. Davis found key information on Peter Patterson: he was a World War I veteran and his military enlistment and discharge records provided more information on him personally.

In 2008, I traveled to Robeson County's public library. Although there was little information there that I didn't already

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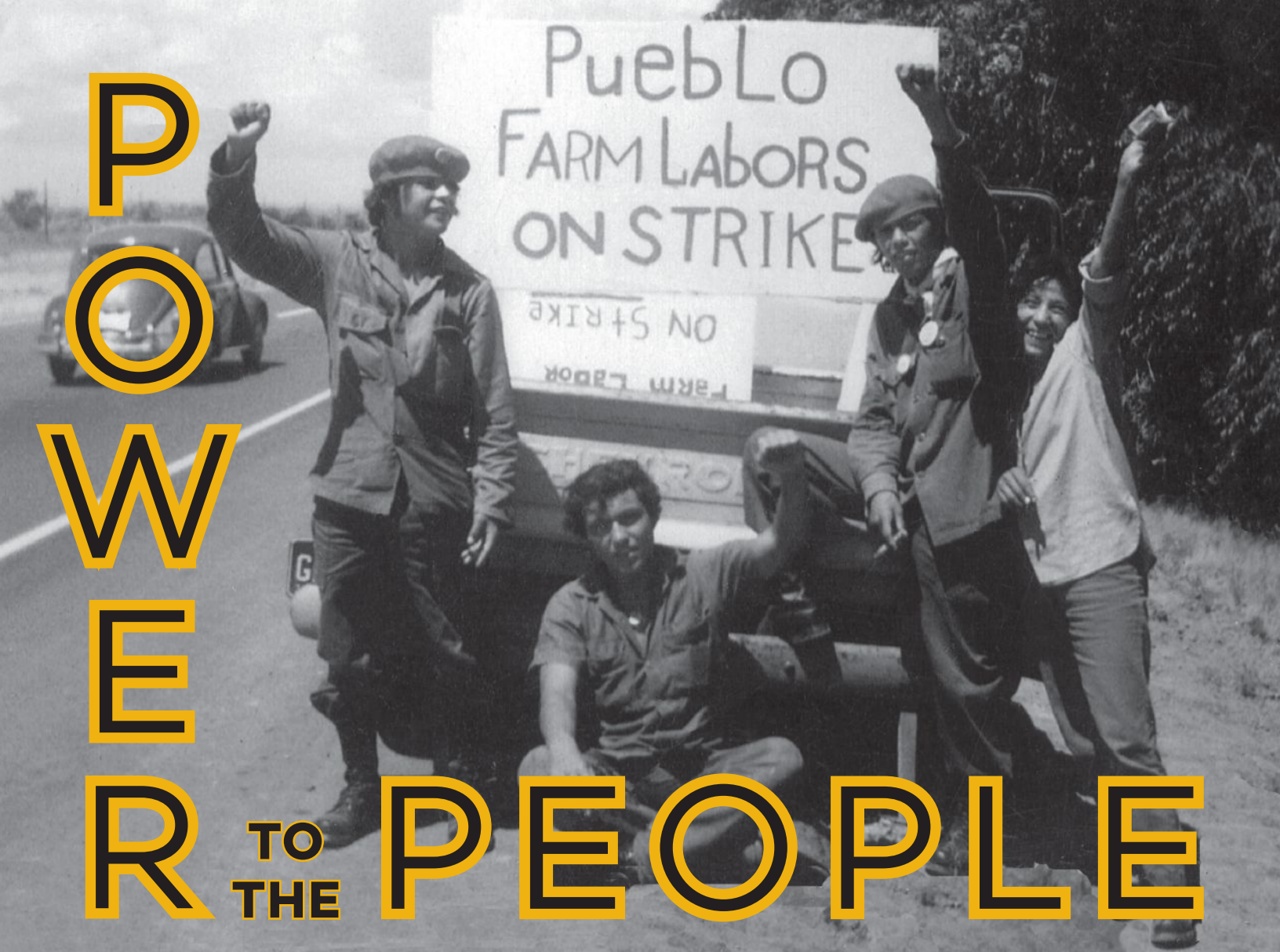
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# POWER TO THE PEOPLE

## Building the Colorado Chicano Movement Archives

Beverly B. Allen, Colorado State University–Pueblo

Pueblo, Colorado, farmworkers strike. *Courtesy of the Garcia Family Papers, Colorado State University–Pueblo.*

The archival collection at Colorado State University–Pueblo initially was largely focused on the history of the institution. In the past seven years, we expanded the collections to more closely reflect the rich ethnic diversity of Southeastern Colorado.

In 2008, CSU–Pueblo received a grant from the David and Lucile Packard Foundation to support this new endeavor. The archives began working with grassroots organizers to document the Colorado Chicano Movement, which was part of a greater national and international struggle challenging social injustice during the 1960s and '70s.

The movement triggered a powerful impetus for transformation in the public education

system, electoral politics, labor practices, and law and order policies; the movement also nurtured a cultural renaissance in Chicano art and literature. As the archives began its work, a truly collaborative relationship with the Chicano community emerged, and the community took a leading role in determining the materials to be preserved.

### What's in the Archives

Once we announced our intention to collect materials related to ethnic diversity, the Chicano community was the first group to approach us. Many were aging community members who had been activists at the height of the movement, and they were

worried about the materials not being preserved. It was a big leap of faith for them to entrust their records to a university—an institution they felt had betrayed them in the past. Not only were we academics, we also were mostly Anglos. With patience and perseverance, we earned their trust, and in return, they helped explain the archives' mission to the community.

Their trust has resulted in rich, engaging collections. The Colorado Chicano Movement Archives includes the papers of the Louis "Lugs" Garcia family, who worked to improve living conditions for families in Pueblo's predominantly Chicano neighborhood of Salado (Salt Creek). The Garcias also advocated for reform



in public schools, farm workers, and adequate health care. Other materials include:

- The Jose Esteban Ortega Papers and the “Freddie Freak” Trujillo Collection, which document the discriminations toward Chicanos in higher education
- The Pablo Gonzales Papers contain materials relating to Project Adelante, a barrio station in Pueblo, Colorado, formed for the purpose of drug abuse prevention and to host educational and recreational activities for Chicano youth
- The Deborah Martinez Papers, documenting Chicano leadership development in Colorado



**Left:** Chicano student holding photo of Neva Romero, Los Seis de Boulder martyr, 2014. *Courtesy of Colorado State University–Pueblo.* **Right:** Chicano students protesting budget cuts at Colorado State University–Pueblo, 2014. *Courtesy of the Save CSUP Collection, Colorado State University–Pueblo.*



### Voices of Protest Oral History Project

Oral history also has proven to be an effective means of connecting the archives to the community. We partnered with the Chicano Studies program to offer a course called Voices of Protest. The idea behind the course is to give students a broad overview

of multicultural US history and assign additional readings in Colorado history, the opportunity to do an oral interview with an individual involved in the Chicano Movement, and a project related to this interview. The oral history interview connects students to the archives in that the material they helped to create is part of their institutional experience at CSU–Pueblo and has a permanent place in the library.

Voices of Protest has been so successful that it's spawned related projects, including the Anti-Columbus Day project (which involved interviewing Chicanos and Italians about the Pueblo protests) and the Colorado Latino Veterans Project.

### Working with Stakeholders: It's All about R\*E\*S\*P\*E\*C\*T

As archivists and academics, we have learned some valuable lessons over the past seven years. Here are some tips to help build closer partnerships with ethnic communities:

- Establish an advisory/advocacy group for the archives that includes members of the

**Continued on page 32 >**



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# University & Archives Community Organizations

## Establishing a Partnership

In 2005, as the CAF planned to relocate its offices, TIARA approached CAF to offer to preserve the more than 79,000 inactive archival records of the MCOF that were not slated to move to the new offices. After the CAF accepted and transferred custody of these records to TIARA, the genealogical organization began to process and index the records and to provide reference services for researchers around the world. A minor flood in TIARA's storage area in 2009, however, induced the organization to search for a more secure, permanent home for the records. After approaching several Boston-area archival repositories, TIARA transferred

ownership of the MCOF records (spanning 1879 to 1986) to the UASC at UMass Boston in 2011.

Because TIARA members were heavily invested in the Foresters records, the collection was donated to UASC with the express agreement that the two bodies would work to establish a mutually beneficial partnership. UASC would provide resources, storage, and reference services for the records, and TIARA would continue to help process and index them. This would mean loosening some of our administrative control over the records and thinking beyond the "traditional" role of an archives, but we believed strongly that collaborating with TIARA would best serve the materials, TIARA's community, and potential researchers. First and foremost, TIARA members were able to commit a

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## Ensuring Access through Collaboration

Jessica Holden, Andrew Elder, and Joanne Riley, University of Massachusetts Boston

Community engagement remains at the heart of University Archives and Special Collections (UASC) in the Joseph P. Healey Library at the University of Massachusetts Boston. UASC was established in 1981 as a repository to collect archival material in subject areas of interest to the university, as well as the records of the university itself. In addition, the university's urban mission and strong support of community service are reflected in records of and related to urban planning, social action, alternative movements, community organizations, war and social consequence, and local history related to neighboring communities, including collections associated with Dorchester and the Boston Harbor Islands. For more information, see <http://openarchives.umb.edu>.

### Community Engagement

In 2011, to further our community-engaged mission, UASC began to focus on working with, promoting, and assisting community archives in the greater Boston area through facilitating cross-organization collaboration and access to informational, educational, and practical resources relevant to archival procedures and best practices.

The guiding tenets behind this continuing commitment emerged, in part, from UASC's multifaceted collaboration with The Irish Ancestral Research Association (TIARA), a local nonprofit organization established to develop and promote the growth, study, and exchange of ideas among people and organizations interested in Irish

genealogical and historical research and education. Our collaboration with TIARA formally began in 2011, driven by a unique collection, the records of the Massachusetts Catholic Order of Foresters (MCOF).

### The Massachusetts Catholic Order of Foresters

MCOF was founded in 1879 by a group of Irish immigrants to provide life insurance benefits for its members. The organization grew from one small group in Boston to branches across the state. By 1893, there were ninety-five Forester Courts (local branches) throughout Massachusetts, including several German Courts, and beginning in 1894, women were admitted to the Foresters as well as men. By 1930, there were 60,000 members of the Foresters in Massachusetts and there was at least one court in Rhode Island. The MCOF was renamed the Catholic Association of Foresters (CAF) in 1960 and still exists today as a fraternal life insurance society.

Each prospective Forester applying for coverage completed an application that included personal data, family information, and a physical examination. Subsequent death benefit disbursements listed beneficiaries and correspondence regarding beneficiaries was included in the records. This material reveals a wealth of information about family structure, health, mortality, mobility, and occupations of predominantly Irish immigrants and descendants. For more information on the Foresters records, see <http://blogs.umb.edu/archives/foresters>.



TIARA's office and storage space. Courtesy of University Archives and Special Collections, Joseph P. Healey Library, University of Massachusetts Boston.

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# Diversifying the Library and Information Science Profession

## ALA's Knowledge Alliance Program

**Steven D. Booth (National Archives and Records Administration), Holly Smith (Spelman College), Hannah Lee (University of Delaware), and Deena Smith (Federal Judicial Center)**

The struggle to build and cultivate a racially diverse workforce continues to be a challenge for the library and information science (LIS) profession. Despite the past and ongoing diversity initiatives and graduate funding opportunities, the number of minorities within librarianship remains low. Out of 8,227 students who received degrees in 2011 from accredited LIS programs, only 14 percent (1,117) were minorities.

Based on these statistics provided by the Association for Library and Information Science Education, not much has changed since 2001 when students of color comprised 12 percent (504) of the 4,953 graduates. For that reason, it comes as no surprise that from 2000 to 2010, the number of employed underrepresented racial and ethnic credentialed librarians has increased by only 1 percent, according to the American Library Association's (ALA) *Diversity Counts* report.



Ohio University student interacts with Michelle McKinney of Knowledge Alliance. Courtesy of Knowledge Alliance.

### The Discovering Librarianship Program

In an effort to combat the harsh reality of these statistics, the ALA Office for Diversity established the "Discovering Librarianship: The Future is Overdue" program. This multiyear initiative, funded by the Institute of Museum and Library Services (IMLS), supports the efforts of early career librarians and archivists—representing the diversity of accredited LIS programs and career opportunities—to develop and lead a local recruitment effort to expose high school and college students of color to the profession.

Through a competitive application process, 35 recruiters were chosen and convened to attend a rigorous two-day training session during ALA's January 2011 Midwinter meeting. During these sessions, recruiters became well versed in the areas

of workforce trends, salary data, graduate education options, professional and funding opportunities, and advocacy efforts. The sessions also focused on team-building exercises so participants could discuss their journeys to librarianship, and develop their elevator speeches, public speaking skills, and stage presence. With newly acquired information and strategies, the recruiters brainstormed to create the recruitment initiative's brand, which they called "Knowledge Alliance."

After the training, recruiters identified college and career fairs to attend in their local and regional areas. The initial goal at any fair is to always make a connection with the student based on their major and career goals. Recruiters share with the students their own personal and professional experiences and discuss what led them to pursue a career in librarianship. Based on their interests, recruiters outline potential

opportunities and highlight the importance of LIS graduate education. And if necessary, references to the profession in pop culture are used as a way to keep their attention ("Beyoncé has an archivist!").

### The Knowledge Alliance Website

The Knowledge Alliance website ([knowledgealliance.org](http://knowledgealliance.org)) also has enabled recruiters to engage with a larger audience of potential information professionals at every step of their journeys, from initial interest to selecting a graduate program and pursuing professional opportunities. The website features an events calendar that highlights upcoming fairs across the country where interested students can interact with recruiters face-to-face. They also have

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# LAUNCHING AN ESSENTIAL RECORDS PROGRAM

*Living Essentially  
in 2013*

20 21 22 23 24 25 26  
27 28 29 30 31

**Dr. Melanie Sturgeon, Karen Gray, and Jerry Lucente-Kirkpatrick,  
Arizona State Library, Archives, and Public Records**

In Arizona, we face the same challenges that all government archivists and records managers face: too much work needs to be done, too few employees to do that work, and more customers than we can properly serve.

In light of this, we believe managing and preserving our essential records is one of the most important challenges we face, but that challenge is often buried under the squeaky wheel of the immediate. Sometimes, circumstances conspire, stars align, and when all is finally right with the universe, we are presented an opportunity to move essential records to the forefront. In 2013—which we dubbed the “Year of Living Essentially”—we embarked on a yearlong campaign to educate and train all Arizona public bodies on essential records.

## Records Management Statutes

A 2011 revision to the agency statutes led to our designating 2013 as the Year of Living Essentially. Since the early 1970s, Arizona had two records management statutes specific to essential records, which apply to

more than 1,500 public bodies. The current text of these Statutes reads:

- §41-151.12. Records; records management; powers and duties of director; fees; records services fund
4. Establish criteria for designation of essential records within the following general categories:
    - (a) Records containing information necessary to the operations of government in the emergency created by a disaster.
    - (b) Records containing information necessary to protect the rights and interests of persons or to establish and affirm the powers and duties of governments in the resumption of operations after a disaster.
  5. Reproduce or cause to be reproduced essential records and prescribe the place and manner of their safekeeping.

§41-151.14. State and local public records management; violation; classification; definition

5. *Once every five years* submit to the director lists of all essential public records in the custody of the agency.

During the 2011 legislative session, our agency statutes were revised to add the language “once every five years” (which was previously emphasized) to ARS §41-151.14. Municipal clerks were the first to notice the change and began asking questions. Every day, we received more questions than the day before, but we had few answers. Our new director, Joan Clark, tasked us with learning more about essential records, and locating and providing resources to answer the questions we were receiving.

## Our Game Plan

First, we focused on our agency. There was unadopted draft guidance on essential records from 2001, and the state archives had guidance and information thanks to the Intergovernmental Preparedness for Essential Records (IPER) training from the Council of State Archivists (CoSA). We also learned that the State Department of Emergency and Military Affairs offered Continuity of Operations Planning (COOP) to state agencies, but with limited focus on essential records (the department has since incorporated the guidance we developed as part of the statewide COOP process).

After this initial work, we found ourselves essentially where we started—in serious need of resources. This led to our decision to build our own. After several meetings, we decided on a game plan: develop a series of trainings and aggressively promote them and develop tools and the guidance necessary to enable public bodies to comply with the statutes by completing and submitting a List of All Essential Records.

We opted to use the AT&T Connect system our agency already had to provide a wide audience with focused online training sessions. We settled on four phases to our training: Essential Records Basics (Phase I), Essential Records Town Hall (Phase II), Essential Records Wrap-up (Phase III), and Essential Records Follow-up (Phase IV).

## Spreading the Word

We aggressively marketed this training to Arizona’s state and local agencies. We had a

**Continued on page 35 >>**



# "La Historia de Mi Familia"

## CONNECTING HISPANIC STUDENTS TO HISTORY THROUGH PRIMARY SOURCE DOCUMENTS

Ashley Stevens, National Archives at Philadelphia

"When I first started my project, I thought I wasn't going to find anyone, to be really honest. But when I used Ancestry, I found my great-grandmother. It was really exciting to know something about her—where she lived and if she had any siblings," said Kennyshia Paulino, a freshman from Esperanza Academy Charter High School, at the opening reception for "La Historia de Mi Familia" at the National Museum of American Jewish History on June 4, 2014. In front of an audience of more than one hundred Esperanza students, teachers, family members, and others, she shared her deeply personal experience with the project and how it built up her confidence in both her historical research skills and herself.

Entering its third year, the Esperanza Academy Family History project is an adaptable, ever-evolving educational program geared toward ninth graders at Esperanza Academy, a North Philadelphia school with a predominantly Hispanic student population. The project helps students develop the skills to "do" history, rather than simply read about it. For example, students learn how to discover their own histories and the histories of their families. Over the course of several months, students learn how to use, understand, and locate primary sources, how to conduct and transcribe oral history interviews, and how to transform that information into a website or a three-dimensional exhibit.

The project came about in November 2012 when social studies teachers Julia Snyder

and Celia Flores reached out to Andrea Reidell, education specialist at the National Archives at Philadelphia, with an idea for a family history project. Soon after, I joined the project. During the 2012–2013 school year, we embarked on a project that would subsequently develop into a successful public program.

### The Project

The 2012–2013 pilot project consisted of a series of onsite and offsite visits. This model was established to support in-school teaching and accommodate school-related restrictions (for example, travel costs and testing schedules).

In the first year, National Archives staff members traveled twice to Esperanza, students traveled once to the National Archives at Philadelphia, and there were a series of Saturday workshops. The two consecutive onsite visits, led by Reidell and I, offered students a deeper immersion into analyzing and understanding the uses of primary sources. The visits built upon prior classroom teaching by Snyder and Flores about primary sources. On the first visit to the school, Reidell's "Who Says? Exploring History through Primary Sources" workshop focused on source perspective and document analysis. In groups, students analyzed two documents: an 1800 ship manifest for the schooner *Phoebe* and an August 20, 1800, newspaper article from the *Pennsylvania Gazette*. Students read, discussed, and completed a worksheet with questions designed to foster discussion.



**Top:** "La Historia de Mi Familia" at the National Archives in 2013. **Above:** Closer view of a student's family tree in year one of the project. *Photos courtesy of National Archives at Philadelphia.*

My workshop focused on the US Census, a federal government record. Students compared and contrasted 1930 and 1940 census records of an Austrian family who once resided a few blocks from Esperanza. In this breakout session, students explored what information can be learned from the census about individuals, families, and neighborhoods.

### The Offsite Visit

Esperanza students visited the National Archives at Philadelphia, the Philadelphia History Museum, and the National Museum of African American History and Culture. This field trip afforded students an opportunity to visit cultural institutions in the area. Also, the visit gave students a



chance to see the different ways that history can be told in museums and archives.

At NARA, students were divided into groups of five to eight students that rotated to various stations. Each station was designed to build on the school visits as well as the requirements for the family history project. Led by a NARA staff member or volunteer, the stations were: a primary source analysis station of Puerto Rico–related records, an oral history station, a guided research station on NARA's public access computers, and a photo analysis of an ongoing exhibit. Students began their research into their families' histories, using the computers to access the site. The guided research familiarized them with Ancestry and its holdings. Students could use their research skills at school, which recently obtained an Ancestry subscription.

## The Workshops and Outcomes

On three out of the four Saturdays in May, workshops were offered by Snyder and Flores. The teachers provided supplies and demonstrated how to construct family trees for the exhibit. NARA staff members, volunteers, and interns attended the

workshops to provide further genealogical assistance for students.

At the end of the project, 180 students completed either a website or family tree. Teachers selected thirty family trees to be featured in a National Archives–curated bilingual exhibit, “La Historia de Mi Familia.” The exhibit opened on June 4, 2013, with an opening reception for the students, their parents, teachers, Esperanza organizers, and NARA staff members.

## Challenges

With any program, there are challenges, and the Esperanza Academy Family History project was no exception.

- **Age and Access to Recent Records.**

How and where can you find records for students born in the late 1990s? Unlike older generations, students quickly learned that recent records come with privacy and confidentiality issues. In their use of Ancestry, students expected to find records about themselves and their immediate family. In most cases, what students found on these sites were Public Record Indices that typically pulled from a variety of sources, such as the phone book. While not deeply historical, seeing

information on their parents and places they lived was profoundly personal.

- **Accessibility of Foreign Records.** For the majority of students, they were either first- or second-generation immigrants. Despite the breadth of material available on Ancestry, there was a void of resources for most Caribbean and South American countries, in particular for the Dominican Republic. Although archives exist in these countries, digitized documents available online were scarce. For records, the staff at NARA turned to other resources, such as FamilySearch. At this site, students could search records from the Caribbean and South America. But students faced an additional challenge on this website, as records were digitized but not indexed.
- **Immigration Status and the Idea of Family.** This project raised the sensitive issue of immigration status, particularly of students' parents and grandparents. In collecting primary source documents for their family tree, students were encouraged to work with their families to collect primary documents and discuss their family history. Although this challenge affected a small percentage of students, it raised the important question

Continued on page 36 >>



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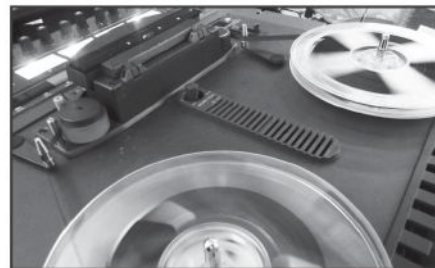
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Anne Hartman, SAA Editorial and Production Coordinator

**T**he unofficial theme of this year's CoSA/NAGARA/SAA Joint Annual Meeting at the Marriott Wardman Park in Washington, DC, was *big*. There were big ideas: Session presenters sparked inspiration and conversations on an array of topics, from aspirations on the future of archival education to archival assessment projects. Big goals were set in motion. In her incoming presidential remarks, Kathleen Roe urged attendees to

join her in a year of living dangerously by "committing some act of advocacy and awareness." And the meeting was successful thanks to the big number of attendees: more than 2,500 lent their support, shared their knowledge, and, most importantly, spread their passion for archives. It was an exceptional week—read on for a few of the many highlights of this year's meeting.

*Photos by Craig Huey Photography.*





## SUNDAY ★ AUGUST 10

- The week kicked off with nine preconference programs, including these two on Sunday: **Archives: Principles and Practices** and the DAS course **Accessing and Ingest for Electronic Records**, where attendees gained knowhow on the policies, resources, and procedures to successfully accession and ingest common born-digital materials.



#saa14 on Twitter

@archivesnext:

Warning: This is like the world series, the prom, the Oscars, etc for archivists in the US. We will be tweeting the hell out of it. #saa14

## MONDAY ★ AUGUST 11

- The Military Archives Roundtable and its chair, Mike Miller, hosted the **War of 1812 Staff Ride** to study the Chesapeake Campaign of 1814. Attendees toured the battle sites of Bladensburg and Fort McHenry and used letters, diaries, and maps to experience first-hand accounts of the war.

## TUESDAY ★ AUGUST 12

- The eighth annual **Research Forum: “Foundations and Innovations”** encouraged attendees to “engage in, be aware of, and benefit from research [concerning] organizing, managing, and improving the operation of archives,” said moderator Nancy McGovern. “Presentations that highlight research and development on the implications of linked data for archives have been a popular

thread for the past two or three years,” McGovern added. “This year featured several presentations on understanding digital curation and preservation research and practice for archives; on education, training, roles, and skills development for archivists; and on interesting applications of data mining of metadata and content from archival collections.”

## DC Central Kitchen Service Project

A dozen Joint Annual Meeting attendees participated in the third annual community service project, helping to prepare meals at DC Central Kitchen (DCK) on the morning of August 12. DCK takes in surplus food from a variety of sources and uses it to make five thousand meals daily. The meals are distributed to one hundred nearby homeless shelters, transitional homes, and nonprofit organizations.

I found DCK through a link on the Archdiocese of Washington’s website. DCK appeared to be well-established (in existence since 1989), reputable (member of United Way, Charity Navigator 4-Star Charity), and had a strong volunteer program. Plus, it was located just a few Metro stops from our conference hotel, which made it a perfect fit for the Joint Annual Meeting service project.

After arriving at DCK, we watched a short orientation video, and then got to work washing, peeling, and chopping food. Afterward, we were invited to stay for lunch, which allowed participants to talk about the experience and get to know each other better.



Annual Meeting attendees participate in a service project at the DC Central Kitchen. *Courtesy of Carole Prietto.*

It was hard work, but we left feeling proud that we helped ensure surplus food would not go to waste and instead be made into nutritious meals distributed to those who needed it most. As a religious archivist working for a community with a mission to serve the poor, it was especially rewarding to have served DC in this way.

Recently I was contacted by members of the Rare Books and Manuscripts Section of the Association of College and Research Libraries who are planning their 2015 meeting in Oakland and would like to do a service project of their own. It was encouraging to know that SAA’s service project is now a model for another organization.

Now, on to Cleveland in August 2015, where you can count me in on SAA’s fourth annual community service project!

—Carole Prietto, *Daughters of Charity*





## WEDNESDAY ★ AUGUST 13



DAS Comprehensive Exam.

- Fifty individuals sat for the **Digital Archives Specialist Comprehensive Exam**.
- The **Regional Archival Associations Consortium** met to review the accomplishments of their first year in action and to brainstorm goals for the upcoming years. "This face-to-face meeting was critical to the group's goal of thinking creatively together to set appropriate plans through 2016," said Co-chair Amanda Focke.
- At the **Congressional Papers Roundtable Preconference Program**, eighty roundtable members and guests discussed the significance of oral history in documenting congressional careers, the results from the roundtable's most recent electronic records survey, and a presentation of the "largest electronic dataset most repositories received, produced by what are variously called 'Correspondence Management Systems' (CMS) in the House, and 'Constituent Services Systems' (CSS) in the Senate," said roundtable member Betsy Pittman. The audience watched a guided presentation of a popular CMS/CSS system, and "for many of the attendees, it was the first opportunity to view in action one of the most significant proprietary electronic management systems, and its resultant dataset, in any congressional office," Pittman added.
- The **Business Archives Section (BAS)** chose the theme "Advocacy in Business Archives" in light of the surprising decision by Target Corporation to let go of its archives staff last year. The group discussed

ways to advocate for themselves as archivists within their broader institutions. "We are consultants, and we need to be able to speak the language of our constituents, like marketing departments and CEOs," said Chair Jamal Booker. "We also need to intelligently explain the value we bring as archivists when we engage on major projects and initiatives with our organizations." (Bonus: The BAS meeting received a big write-up in *Ad Age* on September 3, which described archivists as a "marketer's dream.")



SAA Vice President-Elect Dennis Meissner with President-Elect Kathleen Roe in the Exhibit Hall.

## Defining Archivist

SAA's new Committee on Public Awareness asked meeting attendees "What is an archivist?" and "What do you tell your mom that you do?" Here are a few of the answers that were jotted down:

- "Protector of Democracy"
- "Archivists think about the present as the future's past"
- "Information Advocate"
- "Archivists enable research, scholarship, discovery, and wonder"
- "A friend with knowledge who can help you discover your passion"
- "Archivists are the guarantors of individual liberty and the keepers of collective memory, thereby preventing tyranny and collective amnesia!"
- "A gatekeeper to link the past with the present!"
- "Archivists preserve and tell our stories"



## THURSDAY ★ AUGUST 14

SAA President Danna C. Bell.

- During **Plenary Session 1**, Society of Professional Journalists President and University of Arizona Assistant Professor David Cuillier and Miriam Nisbet, director of NARA's Office of Government Information Services, explored the new face of government "openness" and shared their differing perspectives on the Freedom of Information Act.



William "Butch" Lazorchak (left) of the Library of Congress moderates the discussion at Plenary 1 with David Cuillier and Miriam Nisbet.

- In **Session 101: Getting Things Done with Born-Digital Collections**, speakers stressed that the "born-digital problem is an archival problem with several technology-related components," said Session Chair Brian Dietz. "As archivists, we should determine priorities, goals, and workflows. We shouldn't assume that we don't have the technical capacity to implement some of the software applications we'll likely be working with."
- Attendees of the **SAA Now and in the Future: A Town Hall Conversation with SAA Leadership Forum** joined in an informal conversation with incoming SAA President Kathleen Roe, SAA Executive Director Nancy Beaumont, and several Council members. "We purposefully came to the forum without an agenda," said forum organizer Erin Lawrimore. "I wanted to ensure that the topics of conversation were truly the topics that the members wanted to discuss." Notable topics included changes to the annual meetings; the newly adopted strategic plan; recently created committees, such as the Committee on Public Awareness; and becoming a leader within SAA.

- During **Session 202: Lean In: Archival Management and the Gender Dynamics of Leadership**, speakers emphasized that "we need to be our own advocates for change and to find the courage to speak up when we hear or see things that aren't good. We're in this as a society," said Session Chair Cheryl Stadel-Bevans.



#saa14 on Twitter

@aszingarelli:

Throwing a hard drive in a vault "like accessioning the crate without the painting" — great simile from Getty's Nancy Enneking #saa14



#saa14 on Twitter

@infomartian:

"The good archivist is as good a destroyer as a preserver" — Richard Cox #s205 #saa14

- Attendees met legend **Meyer Fishbein**—distinguished SAA Fellow, forty-year member of the National Archives and Records Service staff, and SAA Council member from 1973 to 1983—in the Networking Café.

## My DC Highlights

"Heather Briston's session on the current landscape of copyright and fair use was so compelling that I not only wanted to stand up and cheer, but was also inspired to tweet for the first time."

—Jodi Allison-Bunnell, Orbis Cascade Alliance

"The opportunity to attend so many diverse educational sessions, on compelling themes such as oral history access, crowd-sourced transcription, and born-digital content, was one of the top highlights of the Annual Meeting experience. Having the opportunity to present a paper during the Graduate Panel was also an experience I feel privileged to have gained."

—Cindy Taylor, University of Texas at Austin





**#saa14 on Twitter**

**@archifydd** Gorn:  
We want students to be moved by history. Not to just intellectually understand it, but to emotionally feel it. #saa14 #plenary2



Reading Room at the Library of Congress during the All-Attendee Reception. *Courtesy of Steve Duckworth.*

## Presidential Address

"We are a strong, vital, powerful group with great minds and passionate hearts. We can be effective advocates for our repositories, our profession, and ourselves if we listen to each other," said outgoing SAA President Danna C. Bell in her inspiring Presidential Address, which can be viewed at <http://www2.archivists.org/2014/presidential-address#.VBHe2ZRdUk0>.



2014 ARL/SAA Mosaic Program Fellows.

- Dr. Cathy Gorn, executive director of National History Day, spoke **Plenary Session 2, "Discovering the Past to be the Future: Inspiring the Next Generation of Engaged Citizens."** Gorn discussed National History Day's Normandy: Sacrifice for Freedom Institute, which encourages students not only to remember D-Day, but also to truly understand the soldiers' personal stories and the reality of their sacrifices.
- **Session 305: Managing Social Media as Official Records** attendees learned that while social media records pose challenges and risks, a "social media plan can be a guide to smart social media records retention decisions," said Session Chair Patricia Franks.
- **Professional Poster Presenters** were on hand to have one-on-one conversations about their posters with attendees. "I had never presented at a conference before, and I felt that a poster presentation was a good way to get my feet wet," said Matt Gorzalski, who presented "Record Group Revision at Southern Illinois University Carbondale." "I wrote a forthcoming article on the same topic, and I felt that the poster was another way to discuss my article with interested archivists."



National History Day Executive Director Cathy Gorn speaking at Plenary 2.



Professional Poster Presentations.

- **Graduate Student Poster Presenters** also shared their projects and connected with attendees. "If I learned anything from the experience, it's that everybody's looking for the answers to a lot of the same questions, but they're not always looking for the same answers," said Beth McDonald, presenter of "Seeing the Archive through Tweets: Three Questions and Eight Considerations for Archiving Twitter."



Graduate Student Poster Presenter Stephen Ammidown presenting "ArchivesSpace and the Opportunity for Institutional Change."

- Attendees walked the halls of the Library of Congress and explored its majestic reading room during the **All-Attendee Reception.**



SATURDAY ★ AUGUST 16

- During the lightning talk **Session 703: From Crawling to Walking: Improving Access to Web Archives**, speakers presented on a variety of methods they are using to integrate access of their web archives with their existing archival and library collections. "The main takeaway was that we are tearing down the silos," said Session Chair Rosalie Lack.



#saa14 on Twitter

@magicallyreal:

Master lesson of #saa14:

You're part of a community of expertise, think of what you can do for others and who you can lean on for help #601

- Sci-fi was analyzed from archivists' perspectives during **Session 704: Live Long and Prosper: Science Fiction in Archives and Special Collections**. Panelists



#saa14 on Twitter

@KDRoe122: #saa14

advocacy reminder:

if we are not at the table  
we could be on the menu.

discussed why archives should preserve records relating to the genre, how science fiction collections are acquired, the challenges involved, and using collection materials for instruction and outreach, said Session Chair Amanda Stow.

These are just a few of the many highlights from our week in Washington, DC. For more on this meeting, visit [www.archivists.org/2014](http://www.archivists.org/2014) or search #saa14 on Twitter. Thank you to everyone who helped make this meeting the big success it was! We'll see you in Cleveland in August 2015.

## Missed a Session of Interest?

Go to [www.archivists.org/2014/schedule](http://www.archivists.org/2014/schedule) and click on the session title to access a description and materials. Most education sessions and both plenaries were audio recorded; the recordings on MP3 can be purchased via [www.archivists.org/bookstore](http://www.archivists.org/bookstore).

CoSA, NAGARA, and SAA thank the following sponsors for their generous support of the Joint Annual Meeting!

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Preservation Technologies**

## SAA Welcomes Five New Fellows



Stephen E. Novak, Frederick J. Stielow, Merrilee Proffitt, Michelle Light, and Mark J. Duffy were named SAA Fellows in August 2014. *Photo by Craig Huey Photography.*

Five members were named distinguished Fellows, the highest individual honor bestowed by SAA, for outstanding contributions to the archives profession. These accomplished individuals were recognized on August 14, 2014, during Plenary I at the CoSA/NAGARA/SAA Joint Annual Meeting.

**Mark J. Duffy**, director of The Archives of the Episcopal Church, earned a master's degree in history and archives from the University of Massachusetts Boston, and achieved doctoral candidacy at the School of Information, University of Texas at Austin. Duffy worked in a variety of institutions early in his career. Serving as the chief archivist and project director for the City of Boston Archives, Duffy was responsible for initiating and administering a comprehensive municipal archives and records management program for the first time for the city. Duffy also worked at Harvard University for six years, as associate curator for University Records and Planning and later as associate director for the Harvard Depository.

Duffy has held his current position as director of The Archives of the Episcopal Church since 1992. His astute and resourceful development of the church archives, and his masterful implementation of records systems and a digital archives program there, has made it one of the

soundest programs among religious archives in the country.

As Duffy built the archives of the Episcopal Church, he published articles and manuals on religious archives, which have won awards and become standards in the professional literature. Duffy's stature in his field of specialization was recognized in 2012 when he was the recipient of the SAA and Society of Southwest Archivists' Sister M. Claude Lane, O.P., Memorial Award for his significant contributions to the field of religious archives.

Duffy also has made distinguished contributions to SAA. He has served in a variety of leadership positions, starting with the Archivists of Religious Collections Section, then as a member of the Education Committee, Nominating Committee, SAA Council, co-chair of the 2009 Program Committee, and currently as treasurer of SAA and the SAA Foundation. Duffy was central to the development of the SAA Foundation since first serving on the Council; he initiated and stewarded the 2013 annual fund drive, which brought in \$40,000 in donations.

**Michelle Light**, director of special collections at the University of Nevada, Las Vegas Libraries, earned master of science in information and master of arts in history degrees from the University of Michigan.

Light has held important positions of progressive responsibility at five repositories over the course of her fifteen-year career. In each of her professional roles, she has had a transformative impact on her repository, advancing it in new strategic directions. In her first professional position as an archivist at Yale University, she developed a database of archival authority records for Yale University units that informed her contributions to the international group that created Encoded Archival Context. Later in her career, Light broke new ground at the University of California–Irvine. Working as the head of Special Collections, Archives, and Digital Scholarship, she implemented a virtual reading room that allows researchers near and far to access born-digital records. She also led a multicampus taskforce in creating “Guidelines for Efficient Archival Processing.” Within the first year working in her current role, Light has established infrastructure to sustain an ambitious collecting program to document the Southern Nevada region, completed a staff reorganization that will allow special collections to work more effectively, and carried out a strategic planning process that set direction for her division and contributes to the UNLV Libraries' aspirations.

**Continued on page 22 >>**



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Light has served SAA in a variety of leadership positions, including an active role on the *American Archivist* Editorial Board as well as on the Council, for which she played a critical role in the group's efforts to create a new strategic plan for SAA.

"Light is one of the most creative and accomplished archivists of her generation, and her achievements have had a lasting impact on the field," one supporter wrote. "Her intelligence, creativity, work ethic, collegial nature, scholarly aptitude, and commitment to archives are of the highest level."

**Stephen E. Novak**, head of archives and special collections at the Columbia University Medical Center, earned a master of arts in history degree from New York University. Throughout his career, Novak has worked in an array of archival repositories with increasing levels of responsibility. In his first professional position as a field archivist at Seton Hall University, Novak conducted onsite surveys of historic and current records in Catholic institutions across New Jersey. In that

position, Novak "immediately exhibited several traits that have characterized his archival career ever since," one supporter wrote. "Rather than focus narrowly on his own particular project, he demonstrated a wide-ranging curiosity that extended to every aspect of archival administration." Later, as archivist at The Julliard School, Novak took on the daunting task of establishing an archives and records management program at the institution. He not only accomplished this task, he also helped produce an award-winning guide to the collections and made the archives a vital part of the organization. Novak has held his position at the Columbia University Medical Center since 1997 and is responsible for administering all aspects of the collection, which includes the archives of the Columbia University Medical Center and a rare book collection of 27,000 volumes.

Novak also has taken an active role in several groups within SAA. Perhaps most significant is that he was one of the founders of the Lesbian and Gay Archives Roundtable (LAGAR), a group that has become a strong voice within SAA for the

concerns of lesbian, bisexual, gay, and transgendered (LGBT) collections and archivists. Novak was an enthusiastic member of the LAGAR committee that oversaw the creation of *Lavender Legacies* (1998), the first formal and comprehensive guide to primary source material relating to the history and culture of LGBT people held by North American repositories. Novak also has served on SAA's Science, Technology, and Health Care Roundtable's Steering Committee and as a co-chair.

**Merrilee Proffitt**, senior program officer at OCLC Research, graduated with a bachelor's degree in history from the University of California at Berkeley. While pursuing that degree, she discovered her passion for archives working as the office manager for the Regional Oral History Office (ROHO) at the Bancroft Library at Berkeley. Throughout her career, Proffitt has been a trailblazer. While serving in positions of increasing responsibility leading up to director of digital archive development at the Bancroft Library, she was a key project

Continued on page 36 >>

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## Leaders Who Inspire

At the 2014 CoSA/NAGARA/SAA Joint Annual Meeting, SAA honored individuals and organizations that went above the call of duty. Their innovative thinking, dedication, and passion have bettered the profession and called attention to the significance of archives. Read on to learn about their outstanding contributions to the field.

### Advocacy/Public Awareness

#### J. Franklin Jameson Archival Advocacy Award

The **Lesbian-Gay-Bisexual-Transgender (LGBT) Center of Central Pennsylvania History Project** and **National History Day (NHD)** and its executive director, **Dr. Cathy Gorn**, are the 2014 recipients of the J. Franklin Jameson Archival Advocacy Award, which honors those who promote greater public awareness, appreciation, and support of archives.



Barry Loveland

The **LGBT History Project** collects and presents the stories of LGBT history in central Pennsylvania as told by those who lived them, through written accounts and video interviews. Started in August 2012, the ongoing project has completed video oral history interviews with twenty-six individuals and collected about ten feet of archival and artifact materials. The LGBT Center has developed a partnership with the

Dickinson College Archives in Carlisle, Pennsylvania, to receive, catalog, store, and make available to researchers and the public the archival and artifact collections donated to the LGBT History Project. Barry Loveland, chair of the center, accepted the award.



Dr. Cathy Gorn

Celebrating its fortieth anniversary in 2014, **NHD** is an academic program in which middle and high school students choose historical topics related to a theme and conduct extensive primary and secondary research through archives, libraries, museums, oral history interviews, and historic sites. After analyzing and interpreting their sources and drawing conclusions about their topics' significance in

history, students present their work in original papers, websites, exhibits, performances, and documentaries.

"A large number of [NHD participants] go on to become lifelong friends of archives and the archival endeavor," one supporter said.

### Philip M. Hamer-Elizabeth Hamer Kegan Award

The **Emma Goldman Papers**

**Project (EGPP)** of the University of California, Berkeley, is the recipient of the Philip M. Hamer and Elizabeth-Hamer Kegan Award. The EGPP has collected and published tens of thousands of documents by and about American social and political activist Emma Goldman (1869-1940). A leading figure in

anarchism, radicalism, and feminism in the United States, Goldman dedicated her life to the creation of a new social order rooted in absolute freedom. In the spirit of Goldman, the EGPP has extended its scholarly research to serve the community and educate the public about the complexity of engagement in social and political transformation. It has published a microfilm edition of the papers and is currently working on a four-volume selective book edition, *Emma Goldman: A Documentary History of The American Years (1890-1919)*. The award was accepted by Candace Falk, director and editor of EGPP.



Candace Falk

### Outstanding Contribution to the Archives Profession and SAA

#### Council Exemplary Service Award

**Gregory Sanford**, former Vermont state archivist, and **Solveig De Sutter**, SAA director of education, are the 2014 recipients of the Council Exemplary Service Award, which recognizes a special



Gregory Sanford

contribution to the archives profession and especially to SAA that is not eligible for one of the other awards given by the Society.

**Gregory Sanford** was initially hired as the editor of the Vermont State Papers and was later promoted to become Vermont's first official state archivist because of his commitment to leadership and the

establishment of a “real” archival program. In this position, Sanford authored a new archives and records law and worked tirelessly to create a new purpose-built archival and records center building while working with legislators, educators, media, and others to raise awareness of records management issues. He eventually transformed a state archives of one person (himself) with a part-time receptionist into a dynamic institution that now has more than twenty staff members. Sanford led teams to conceptualize, plan, design, and build a combined archives and records center, which was named the D. Gregory Sanford Jr. Building. Sanford, who retired in May 2012, regularly penned his column, *Voices from the Vault*, which appeared in the Vermont Secretary of State’s monthly publication and demonstrated the relevance of records to current debates in meaningful ways and displayed his special humor and sense of wonder.

**Solveig De Sutter** joined the SAA staff in 2000 and has worked with the Committee on Education to develop a world-class continuing education program that includes workshops, seminars, and webinars on a variety of topics. In the past year, De Sutter has scheduled 115 workshops in an array of locations across the country. She also has coordinated the work of the Digital



Solveig De Sutter

Archives Specialist Subcommittee in the development of the pioneering DAS Certificate Program, which now boasts more than eight hundred participants. She has dependably provided guidance and direction to new and seasoned instructors who have ably contributed to the education program’s success.

## Sister M. Claude Lane, O.P., Memorial Award

**Judi Fergus**, the director of the Arthur Moore Methodist Museum, Library, and Archives in St. Simons Island, Georgia, is the 2014 recipient of the Sister M. Claude Lane, O.P., Memorial Award. The award honors an archivist who has made a significant contribution to the field of religious archives. Fergus is responsible for preserving the history of the United Methodist Church and the South Georgia



Judi Fergus

Conference of the United Methodist Church. In this position, Fergus has gathered local church histories of more than six hundred local churches. Fergus also helps welcome more than twenty thousand visitors to the museum each year, directs educational programs for groups of all ages, and is in charge of a reference library of more than five thousand volumes. In addition, she has

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developed exhibits depicting the role of women in the United Methodist Church, life in colonial Georgia, coins of the Bible, and other topics.

## Spotlight Award

**Kate Theimer**, author of the popular blog *ArchivesNext*, is the 2014 recipient of the Spotlight Award. The Spotlight Award recognizes the contributions of individuals who work for the good of the profession and archives collections—work that does not typically receive public recognition. Since 2011, Theimer has used Facebook, Twitter, and her blog to raise money for Spontaneous Scholarships that help unemployed, underemployed, and underfunded archivists to attend SAA's Annual Meeting. The first year the scholarships were offered Theimer raised \$5,504 to assist 18 students and 8 SAA members at the full registration rate; the program continued in 2012 and 2013 resulting in a total of more than \$20,000 in donations. For the 2014 Joint Annual Meeting, Theimer raised \$11,210 to support 28 students and 23 regular members.



Kate Theimer

## Diversity Award

**Recovering the U.S. Hispanic Literary Heritage Program**, led by Nicolás Kanellos and Carolina Villarroel at the University of Houston, and **Jennifer O'Neal**, Corrigan Solari University Historian and Archivist at the University of Oregon (UO) Libraries, are the recipients of the Diversity Award, which recognizes an individual, group, or institution for outstanding contributions in advancing diversity within the archives profession, SAA, or the archival record.



Carolina Villarroel

The **Recovering the U.S. Hispanic Literary Heritage Program** is being honored for providing access to important Latino archives by making them publicly available to educational institutions and communities via print and electronic delivery. The program has accessioned, organized, and described such notable collections as that of Leonor Villegas de Magnón, a Laredo activist who

in the early twentieth century recruited Anglo Texan, Mexican American, and Mexican women for a nursing corps to tend to the wounded and fallen on the battlefields of the Mexican Revolution. As an early feminist, she documented the role of women in her writings. The program also has assembled the world's largest collection of microfilmed Hispanic newspapers published in the United States from 1808 to 1960.

Throughout her career, **Jennifer O'Neal** has made contributions that reflect the criteria for the Diversity Award, particularly to American Indian and other indigenous groups. O'Neal joined SAA in 2003, helping to found the Native American Archives Roundtable in 2005. After participating in the drafting of the *Protocols for Native American Archival Materials* in 2006, she participated in a multiyear process to bring awareness about the Protocols and advocated strongly for an SAA endorsement, which had a major impact on the profession's discussion of Native American archives. O'Neal has continued to take leadership roles and advance issues of diversity via SAA's Native American Protocols Forum Working Group and through the formation of SAA's new Cultural Heritage Working Group, for which she currently serves as co-chair. At UO, O'Neal was a lead instructor for the Oregon Tribal Archives Institute, an initiative that helped provide basic archival training to archivists, records managers, curators, and cultural resources specialists affiliated with Oregon's nine federally recognized tribes.



Jennifer O'Neal

## Archival Innovator Award



Trevor Owens

**Trevor Owens**, a digital archivist with the National Digital Information Infrastructure and Preservation Program at the Library of Congress, is the 2014 recipient of the Archival Innovator Award. Established in 2012, the Archival Innovator Award recognizes archivists, repositories, or organizations that show creativity in approaching professional challenges or the ability to think outside

the professional norm or that have an extraordinary impact on a community through archives programs or outreach. Owens has led a plethora of creative initiatives that in some way have helped to move the archives profession forward. He has conserved and organized innovative events to bring the preservation community together; for instance, he led the Preservation.exe: Toward a National Strategy for Preserving Software conference at the Library of Congress as well as the Curatecamp: Exhibition "unconference" that brought together archivists, preservationists, and digital collection managers to discuss what access and exhibition mean for archives and archivists in the era of online platforms and delivery. Owens' work also has led to a number of practical tools and documents for the archives community, including the Levels of Digital Preservation framework document, which demystifies digital preservation best practices.

Continued on page 37 >>

# TOP OF THE CLASS

Eight exceptional students were honored during Plenary II at the CoSA/NAGARA/SAA Joint Annual Meeting on Friday, August 15, 2014. Each of these students has demonstrated scholastic and personal achievement, as well as the potential to become an influential member of the archives profession.

**Joanna Chen** is the recipient of the Josephine Forman Scholarship. Established by the General Commission on Archives and History

of the United Methodist Church, the scholarship supports minority students pursuing graduate education in archival science and promotes the diversification of the American archives profession. Chen is pursuing a master of library and information science degree at the University of California, Los Angeles. She discovered her passion for archives while working at the Los Angeles Museum of the Holocaust, where she processed collections, created finding aids, researched for exhibitions, led workshops, and provided reference for diverse communities.



Joanna Chen

**Michelle Chiles**, a 2013 alumna of the Simmons College Graduate School of Library and Information Science, is the recipient of the Donald Peterson Student Travel Award,



Michelle Chiles

which supports students and recent graduates within North America to attend SAA's Annual Meeting. As a founding member and former co-chair of the New England Archivists' Roundtable for Early Professionals and Students, Chiles helped implement a pilot mentoring circles program. Chiles shared her perspectives on mentoring at the CoSA/NAGARA/SAA Joint Annual Meeting session "A Push in the Right Direction: Expanding Models of Mentorship."

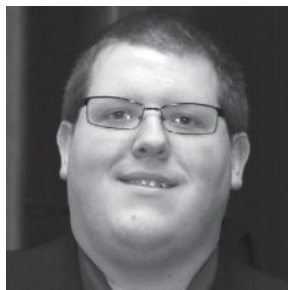
**Raquel Flores-Clemons**, a graduate student in the School of Library and Information Science at the University of Illinois

at Urbana-Champaign, is a recipient of the Harold T. Pinkett Minority Student Award, which recognizes students of African, Asian, Latino, or Native American descent who, through scholastic achievement, manifest an interest in becoming professional archivists and active members of SAA. While pursuing her master's degree, Flores-Clemons has served as an active member of an archives that seeks to identify, collect, and preserve digital and paper records that document the creative process and practices of members of Midwest hip-hop communities.



Raquel Flores-Clemons

**Joshua D. Hager** is the recipient of the Theodore Calvin Pease Award for superior writing achievement by a student of archival

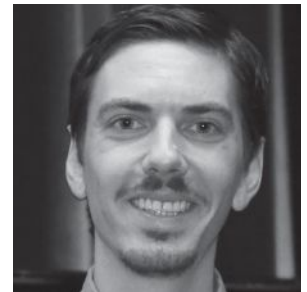


Joshua D. Hager

studies. Hager recently earned a master's degree in information science from the University of North Carolina-Chapel Hill School of Information and Library Science. His paper, "To Like or Not to Like: Understanding and Maximizing the Utility of Archival Outreach on Facebook," was nominated by Dr. Helen R. Tibbo. Hager's award-winning work will be published in the Spring/Summer 2015 issue of *The American Archivist*.

**William Levay** is the recipient of the F. Gerald and Elsie Ham Scholarship for a graduate student in archival studies

at a US university. Levay is attending the School of Information and Library Science at Pratt Institute. Prior to attending the Pratt Institute, Levay worked as a processing archivist and graduate assistant at New York University's Fales Library and Special Collections as well as the archives assistant at the Associated Press (AP) Corporate Archives. Levay currently works as the graduate assistant on the Linked Jazz project and was the sole developer of the new website of the ARChive of Contemporary Music.



William Levay

**Rebecca Nieto**, a master's student in the library and information science program at McGill University



Rebecca Nieto

Continued on page 32 >>



**Michelle Elligott** has been named the chief of archives at the Museum of Modern Art. In this newly established position, Elligott will lead the institution's program of acquiring, preserving, and making accessible archival and primary source collections related to twentieth- and twenty-first-century art.



**Robert Leopold** was recently appointed deputy director of the Smithsonian's Center for Folklife and Cultural Heritage, home to the Ralph Rinzler Folklife Archives and Collections. Previously he served as director of the Smithsonian's Consortium for World Cultures, and earlier, as director of the

National Anthropological Archives and Human Studies Film Archives.



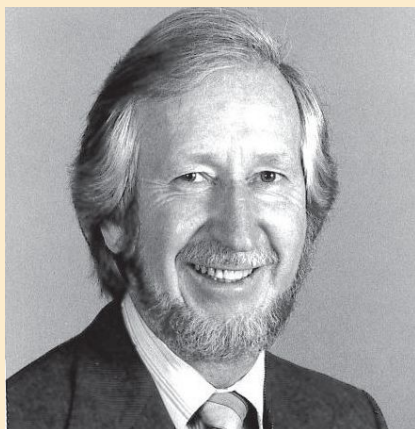
**Laura Uglean Jackson** recently was appointed the archivist for university archives at the University of California, Irvine (UC Irvine). Prior to UC Irvine, Uglean Jackson served as a manuscripts and university archivist at the American Heritage Center at the University of Wyoming.



**Kim Sims** recently became the university archivist at the College of William and Mary's Swem Library. Sims previously worked at Duke University, where she served as technical services archivist for the Rubenstein Rare Book and Manuscript Library, managing institutional records

and select manuscript collections, developing guidelines for the processing of electronic records, and curating exhibits.

## IN MEMORIAM



**Kenneth W. Duckett**, an icon of the archival profession and a stalwart of the Midwest Archives Conference and SAA, passed away on July 12, 2014, in Mechanicsburg, Pennsylvania, at the age of ninety.

Duckett served in the U.S. Army during World War II and graduated from the University of Denver following the war. He began his career as an archivist at the Wisconsin Historical society after being trained by the famed historian William B. Hesseltine at the University of Wisconsin.

Duckett was catapulted to the national stage while working at the Ohio Historical Society, where he played a pivotal role in saving from destruction the letters of US Senator and later President Warren G. Harding to his lover Carrie Phillips. As he recounted in his book *The Shoe Box Letters* (2003), his role in saving the historically significant Harding letters cost him his job at the Ohio Historical Society.

The next stop in his archival career was at Southern Illinois University (SIU) Carbondale. As curator of manuscripts in SIU's Morris Library, Duckett built the manuscripts repository into one of the best in the country, a repository that had nationally prominent collections far exceeding what historians and literary scholars expected to find at a small university. After retiring from SIU, Duckett moved to Oregon, where he concluded his career at the University of Oregon.

But Duckett was much more than a distinguished archivist. His quiet but engaging personality, combined with his archival expertise and mentoring of young archivists on his staff and in the profession, earned him the admiration and respect of an entire generation of archivists.

I will dearly miss him. I am very grateful to have known him for more than four decades as a colleague and close friend.

—Patrick M. Quinn, university archivist emeritus,  
Northwestern University



**Nadia Sophie Seiler**, rare materials cataloger at the Folger Shakespeare Library, died in a road accident August 15, 2014, on her way to the SAA Annual Meeting. For over seven years, Seiler contributed to the scholarly world by providing access to the Folger's art and manuscripts through thousands of catalog records and finding aid descriptions. Her joyful curiosity and expert analysis inspired scholars, interns, and colleagues to learn more about and dig deeper into the Folger collection. At the request of the family, donations in her memory to support continuing the work she loved so much can be made online at [www.folger.edu/give](http://www.folger.edu/give) or by mail to Tiffany FitzGerald at the Folger Shakespeare Library, 201 East Capitol Street SE, Washington, DC 20003.

—Heather Wolfe and Erin Blake,  
Folger Shakespeare Library



# Karen Karyadi

As one of the five fellows in the Association of Research Libraries/SAA Mosaic Program, Karen Karyadi is interning at the Getty Research Institute (GRI), where she has worked with a project team on the Harald Szeemann Collection—the single largest collection that GRI has acquired—processing physical materials and creating descriptive metadata. Karyadi explains how she became interested in the profession through her work in photography and art history and what she hopes to accomplish as a Mosaic Program Fellow.

## SAA: Why did you decide to pursue a career in archives?

**KK:** I came to the archival world by way of my studies in photography and art history, where I developed a strong interest in the dynamic relationship between the visual and commercial arts and mass media, and how the acts of documentation, organization, and preservation of works in these areas are reflected in our general consciousness. My internship experiences further solidified my belief that our history is tied strongly to what is left and made available to us as a society. I realized that it falls largely to us in the archival profession to protect and, yet, make these important works accessible to ensure their awareness and appreciation today and tomorrow—with that, I knew my career path was set.



Karen Karyadi

## SAA: What do you hope to accomplish as a result of your participation in the Mosaic Program?

**KK:** I hope to become more involved and engaged in SAA as I gain a better and more nuanced

understanding of the archival profession. It's a very exciting time, where literal and figurative walls that used to limit us are being torn down. That presents an opportunity for us to establish a stronger professional network, and the Mosaic Program creates an avenue for students and fledgling archives professionals like myself to do exactly that and more.

## SAA: In your opinion, what's one step the archives profession can take to further attract diverse individuals to the workforce?

**KK:** One way is to reach out and to become more involved within local communities—especially those that are still underrepresented—and through community colleges and universities. As we actively engage the society that we serve and raise awareness of the important role that archives play, I believe that we can draw exceptional individuals into the profession who might not have even heard about it before.

## SAA: Thirty years from now, what do you hope peoples' perception of the archives profession will be?

**KK:** Many people that I have encountered in my daily life have asked, "What exactly is an archivist?" and I think that the issue behind that question is somewhat related to the previous question. The archival world may appear to be a rather rarefied field to most people outside of it and its related areas, and I would love to see that perception changed. We are not just keepers of the past; we are active members of society, helping to shape the present and the future by facilitating a better understanding of our histories.

## SAA: As an archivist, how will you help to diversify collections and bring more awareness to underrepresented cultures?

**KK:** We live in a very image-driven society, but even with the proliferation of still and moving images that we have today, there are gaps and holes that are yet to be filled. At the same time, there are stories and perspectives behind these works that are left unrecognized, especially in collections that concern underrepresented cultures. As an archivist, I hope to work with image-makers and members of such cultures through the documentation, preservation, and exhibition of these diverse collections, and ensuring that their points of view are accurately and wholly presented. ■

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## Call for Applicants: 2015 ALI

The Archives Leadership Institute (ALI) at Luther College provides advanced leadership training and mentorship for twenty-five innovative archival leaders, giving them the knowledge and tools to transform the profession in practice, theory, and attitude. The 2015 application is now open; details about the application process and the characteristics of the ideal ALI participant can be found at [www.archivesleadershipinstitute.org](http://www.archivesleadershipinstitute.org). Applications will close on November 30, 2014.

## Institute of Jazz Studies Opens Women in Jazz Collections

The Institute of Jazz Studies at Rutgers University recently processed the collections of five prominent women in jazz and has opened them to the public. The new collections highlight the lives of Ella Fitzgerald, America's "First Lady of Song"; singer and "vocalese" pioneer Annie Ross; blues singer Victoria Spivey; Wilma Dobie, a pioneering promoter, journalist, and jazz activist; and Abbey Lincoln, best known as one of jazz's leading song stylists. Work on the collections was underwritten by a two-year grant by the Council of Library and Information Resources. The project's portal is available at <http://newarkwww.rutgers.edu/IJS/WomenInJazz/index.html>.

## UIC Library Opens Archives of Historic Commodity Exchanges

Chicago's commodities exchanges were the first in the United States—and heralded the city's arrival as a commercial center. Records of two of these exchanges—the Chicago Board of Trade and the MidAmerica Commodity Exchange—are now available for research in the Richard J. Daley Library at the University of Illinois at Chicago. The collections document the exchanges' history, officers and members, operations, rules and regulations, and statistics. Materials include correspondence, meeting minutes, rulebooks, reports, legal papers, press clips, and publications, as well as photographs and blueprints of the iconic Chicago Board of Trade Building.

## National Film Preservation Foundation Grant Supports Emerson College

Emerson College preserved three films from 16mm to DVD with support from a \$5,300 grant from the National Film Preservation Foundation. Produced in 1955, 1960, and 1966, the films, which are each under ten minutes long, document the opening of the Robbins Speech, Language, and Hearing Center and the Thayer Lindsley Nursery located within the center. Both are clinical training facilities for Emerson students—providing evaluation and treatment for children and adults with speech, language, and hearing needs and educational programs for family members and caregivers. With no copies outside of Emerson College, the films provide a historical record of some of the early treatments and technologies available for speech and hearing therapy.

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## FROM THE ARCHIVIST OF THE UNITED STATES

**David S. Ferriero**

National Archives and Records Administration  
david.ferriero@nara.gov

# NARA Puts Increased Emphasis on Customer Service

Previously in this space, I wrote about what we will do in the next few years in pursuit of one of our four strategic goals: Make Access Happen.

We're pursuing this goal at more than forty facilities nationwide, through print and online publications, with our exhibits and loans of important documents, and on our website and through our vigorous social media activities. But we can, and will, do more.

We plan to build on our successes with our customers and enhance those connections. To that end, we will be pursuing our second goal, Connect with Customers.

*We want to engage our customers in what we do and be an example of open government. That way, we can respond to your needs sooner and more effectively, whether it is a request for records, attending a workshop or exhibit at one of our facilities, or commenting on a proposed federal regulation.*

Some specifics:

## Integrated Researcher Registration System

We're working on an integrated researcher registration system for all our research rooms nationwide. It will provide more efficient means for researcher registration and badge access control to all NARA locations having research rooms.

When this system goes online, which is now scheduled for mid-2015, you can register at one location of your choosing and will have access to all archival and presidential library research rooms nationwide.

## Updated Telephone System

We're updating our nationwide telephone system. In the next year, we plan to provide general information and public access to federal records by responding to callers, connecting them to the appropriate office and/or staff—regardless of where staff is located among our forty-plus locations—and do so within a reasonable time period. The new system will assure that calls are accurately routed to direct lines in appropriate offices, confirm there is committed staff in place to receive the calls, and report how the staff in each office responded.

## Public Participation and Customer Relations

We also want to increase public participation with us, which also helps us get work done. For example, we're digitizing film from World Wars I and II and asking our citizen archivist community to complete transcriptions. They also have been helpful in preparing documents for scanning.

We also are beginning our efforts to identify an enterprise customer relationship system, which will provide an automated system for responding to customer requests for all NARA locations. It's important that customers have a seamless, consistent experience across all NARA offices, regardless of where they are when they need NARA.

To connect with more customers, we're launching an expanded national traveling exhibit program. This will take records out of the Washington, DC, area and exhibit them for people unable to visit us in Washington. We already loan some important documents to institutions all around the country.

Through our Office of the Federal Register, we are taking steps to allow citizens to get involved earlier with federal agencies in the rulemaking process. At the same time, we're helping the agencies better handle citizen comments on regulations being developed.

Our customers also include other federal agencies and Congress, and by improving service to them, we're also improving service to the public. For example, we continue to provide guidance and assistance to help agencies manage their records and emails in accordance with directives and guidance we have issued in the past year or so. By doing so, we help all government customers.

For Congress, we have created a new Internet portal for congressional staff and researchers that will provide a streamlined system to search the legislative records held by our Center for Legislative Archives.

At the National Personnel Records Center in St. Louis, we're adding staff to handle a big backlog of requests from veterans for information from their personnel files. We've also taken over the duty of getting veterans medals awarded to them by the Navy, Marine Corps, and Coast Guard; we are already doing this for the Army and Air Force.

\* \* \*

We hope these steps, among many others, will get citizens involved in what we do and allow us to meet their needs—and learn from them.

We plan to continue building long-term, positive, effective relationships and provide a consistent customer experience across programs, platforms, and locations. We will be a model of open, participatory government responsive to the needs of its citizens. ■

## Telling the Stories continued from page 3

researchers' understanding of the disaster. These video interviews have proven to be an invaluable source of information that was previously only available in lengthy and dry reports. Making available these oral histories, which poignantly depict the horror of the event and the commitment of those involved, has enhanced our collection immeasurably.

We have sixty-seven oral history interviews in the archives. Two of these interviews are audio only—one participant was uncomfortable being filmed, and the other was recorded by a family member.

"Telling the Stories" also has been expanded to include interviews done by a Syracuse University news station in 2008 and written narratives submitted by individuals who want to record an oral history but are unable to be present in person to record a session. We have chosen to include items like these because it has truly morphed from a project into a collection, and we want to capture anyone's story—regardless of technological barriers. As interest in the collection remains high, we plan to continue to regularly add interviews.

## Preview the Collection

The collection may be previewed at [http://archives.syr.edu/panam/story\\_archives/](http://archives.syr.edu/panam/story_archives/). We share one- to two-minute clips of each interview, which was stipulated by the release form each participant signed. We also provide digital copies of the written narratives if digitization permission was given. The entire oral history interviews are intended for archival purposes only and are therefore only available in full in our reading room.

\* \* \*

"Telling the Stories" was initially launched because of Syracuse University's connection with many of the passengers on Pan Am Flight 103. Through this program, we've become familiar with all the victims and many of the countless people affected by this disaster. We hope the power of the interviewees' words helps to shine more light on this tragedy and the lives that were lost. ■

## A Slave Called Joe continued from page 5

know, I did photocopy a page from the local telephone directory listing the Patterson names. I composed a form letter asking for information about Patterson family genealogy and mailed copies to the families listed in the directory. Within a couple weeks, I received a reply from Elaine Patterson-Miller, who mentioned that the Pattersons would be holding a family reunion in Robeson County and encouraged me to come. It was an invitation I could not pass up.

On Labor Day of that year, I drove about two and a half hours from Charlotte to Robeson to attend the reunion. Family members emerged from cars parked along a dusty, two-lane country road with green bean casseroles, salads, baked beans, sweet tea, and all the fixings that make for a delicious holiday.

Elaine introduced me to several members of her family; with each introduction, I explained who I was, where I was from, what I was doing, and what I hoped to discover. Eventually I sat down with three sisters: Elizabeth, Mae, and Brenda Patterson.

This is where it gets a bit tangled. The women shared that there are actually *two*

different African American families named Patterson. To complicate things further, the two families had intermarried. I then pulled out my notes and genealogical tables listing the names of so many Pattersons—Frank and his fourteen siblings—and asked the women if they were familiar with any of the names.

"Well, these are our aunts and uncles, and Frank is our father," the sisters exclaimed.

*Eureka!*

After three years of searching, I connected with living descendants of Joe, who was first identified in 1828 when he was a seven-year-old slave. This was truly an Alex Haley *Roots* moment! This important information connecting the past with the present was added to my PowerPoint program about Joe. I also recruited some friends and colleagues to read from the Patterson family papers that pertain to Joe. These recordings enhanced the effects of this program.

Researching Joe and his descendants—and ultimately meeting members of the Patterson family—brought him to life for me. It was a special moment in my career, reinforcing how vibrant, complex, and illuminating archives can be. ■



Brenda Patterson-McEachin, Elizabeth Patterson-Smith, Mae Patterson, and Bob McInnes at the Patterson family reunion in Red Springs, North Carolina. Photo by Shawn Kelly Smith.

## Power to the People continued from page 7

community to help acquire donations, plan events, and steer clear of minefields.

- Attend/participate in community events. This shows respect for, and interest in, the community, its history, and culture. Cinco de Mayo is a huge celebration in Pueblo and an ideal opportunity for us to reach out to the community on its own terms.
- If you're in a university context, hire students from the culture. They can be powerful liaisons and advocates for the archives. One of our donors once told me how happy he was that we had Chicano students working in the archives because they had *corazón*, a passion, for the work.
- Put aside the "archivist knows best" mentality. Respect the community's knowledge of itself and allow the documentation that *they* think is important to help inform collection building.
- Create an outreach program based on the nature of the collection and on the interests of the community. Most recently, we partnered with our Chicano Studies students and the public library to do a program for the fortieth anniversary of Los Seis de Boulder, when two car

bombings resulted in the deaths of six young Chicano activists.

### A Family Affair

As we've shifted focus to the ethnic community, we've noted subtle and not-so-subtle changes both in ourselves and the community. For instance, in the last year, we've begun taking our video camera into the community more and filming everything from protests over the cuts to the Chicano Studies program at CSU-Pueblo to Cinco de Mayo celebrations. As we've taken on a more active role in documenting events in the community, we've become more invested in not only the community's culture and history, but also its goals and aspirations. And, inevitably, we as archivists have become more visible and more relevant to that community.

It often seems as though the Chicano community in Pueblo is an extended



Louis "Lugs" and Delfina Garcia Family, activists and donors, 2010. *Courtesy of the Colorado State University-Pueblo.*

family. The connections among community members run deep—individuals have advocated alongside one another to clean up the Salt Creek barrio or integrate Chicano studies into Pueblo schools. Members have made tortillas or music together for community events—all things that build a community. And while the archives will always be, in some sense, the "other," we've made significant inroads into the community and family. ■

*This information was shared during the Professional Poster Presentations at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting.*

## Top of the Class continued from page 26

in Montreal, Canada, is a recipient of the Mosaic Scholarship. The prize provides funding to students who manifest a commitment to the archival profession and advancing diversity concerns within it. Prior to attending McGill University, Nieto spent a year as a library assistant at Albuquerque Academy and volunteered with Indian Pueblo archives. Nieto, who is spearheading an SAA student chapter at her institution, was commended for her exceptional academic work. "[Nieto] is bright and articulate and often stimulates classroom discussion with her thoughtful comments," one supporter wrote.

**Maria Sánchez-Tucker**, a master's student in the library and information science program at the University of Wisconsin-Milwaukee, is a recipient of



Maria Sánchez-Tucker

challenging position as the founding and executive director of the Bessemer Historical Society (BHS) in Pueblo, Colorado. While working for BHS, she helped raise \$6.5 million to renovate an historic building so it could become the Steelworks Museum and Archives.

**Allan Jason Sarmiento**, a graduate student in the Capital Campus Public History Program at California State

the Mosaic Scholarship. After earning a master's degree in museum science from Texas Tech University, Sánchez-Tucker

took on the challenging position as the founding and executive director of the Bessemer Historical Society (BHS) in Pueblo, Colorado. While working for BHS, she helped raise \$6.5 million to renovate an historic building so it could become the Steelworks Museum and Archives.

University, Sacramento, is a recipient of the Harold T. Pinkett Minority Student Award. While pursuing his degree, Sarmiento has gained

professional experience through working at the California State Archives, the Center for Sacramento History, and the Yolo

County Archives, among other institutions. Sarmiento also had a leading role in establishing the Welga! Archives, which has a mission to store and make accessible primary source materials detailing Filipino-American labor history. ■



Allan Jason Sarmiento



## University Archives and Community Organizations

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far more substantial number of hours to processing the records than UASC would have been able to provide. Thanks to this understanding and TIARA's continued efforts, the Foresters records became accessible more quickly.

UASC's partnership with TIARA has not been without its glitches and setbacks, however, so throughout the course of the partnership, we've kept the following questions and issues in mind: How can a university archives establish a successful ongoing relationship with a community organization? What are the benefits and challenges of such a collaboration? What are the lessons learned on both sides?

### Takeaways

As part of our poster presentation at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting, we explored four main takeaways from our collaboration with TIARA.

**1) Community organizations are in love with their collections.** Communities are often invested in their records in a more personal way than archival repositories. In recognition of TIARA's connection to and work with the Foresters records, UASC has provided TIARA members with special consideration throughout the course of our collaboration. TIARA volunteers are granted special access to certain UASC facilities and maintain a special relationship with the collection through indexing and processing activities. UASC created an exhibit and hosted a public event, "Calling the Heart Back Home: Irish-American Stories from the Archives," which celebrated TIARA's work with the Foresters records and drew more than 150 attendees. At the event, UASC presented TIARA with the 2012 Joseph P. Healey Community Archives Award to celebrate TIARA's role in preserving and processing the Foresters records. In November 2013, UASC and TIARA collaborated on an Irish immigrant-themed "Mass. Memories Road Show," an event-based public history project produced by UASC that digitizes family photos and memories shared by the people of Massachusetts.

The 2013 event brought together TIARA members, UMass Boston staff and students, and local community members to record and digitize more than three hundred photographs and stories related to the Irish immigrant experience. For more information about the Mass. Memories Road Show, see <http://openarchives.umb.edu>.

**2) Community organizations often fear bureaucratic gatekeepers.** UASC readily acknowledged and worked to mitigate TIARA's access concerns when we were first approached about serving as a permanent home for the Foresters records. When collections are accessioned into an archives like ours, the material can become less readily accessible (or even closed off) to the donating and/or creating bodies. We felt that this was a valid concern, and so we put into place several policies that would keep the records open to TIARA. First of all, UASC agreed to store the bulk of this collection onsite rather than in our offsite facility, recognizing that onsite storage would facilitate TIARA's continuing access to and work with the records. We also offered to waive reproduction fees for TIARA members and CAF members. Finally, we applied University resources to increase access to the collection, including improving and expanding searching and look-up tools. For example, before TIARA donated the Foresters records to UASC, they had processed and indexed about 29,000 of the collection's more than 79,000 records. Once the materials arrived at UMass Boston, we created a fully searchable, online database of the indexed records, which allows for expanded access and a more streamlined reference process.

**3) A university archives' competing priorities can frustrate community organizations.** Throughout our collaboration, UASC has consistently provided TIARA with clear, honest information about where the Foresters collection fits within our processing queue. And more specifically, UASC enthusiastically welcomed TIARA's donation without making unrealistic promises about immediate processing or access. Finally, we are careful to communicate any campus issues that affect TIARA's involvement—such as

parking, construction, staff changes, or special events—and we work with TIARA members to find mutually beneficial ways to address and relieve these challenges.

**4) Working with a single community organization can involve many stakeholders.** Rather than receiving the Foresters collection from a single donor, we found that there were many different players invested in the records who sometimes had competing interests. Dozens of TIARA members had worked hard to save the records from destruction, preserve the records, and provide researchers with access. In response to this potential issue of having many different contacts and to facilitate our collaboration and ensure effective communication, both organizations agreed that a long-time, well-respected TIARA board member and researcher would serve as the primary project liaison. In addition, UASC and TIARA have both engaged their institutional and organizational leadership during every stage of the project. UASC connects TIARA volunteers with other communities of interest on campus and beyond through academic programs, courses, departmental activities, and student engagement.

\* \* \*

Since the beginning of our collaboration in 2011, UASC and TIARA have developed a mutually beneficial working relationship. Together we have made available nearly 30,000 Foresters records and have responded to hundreds of reference requests. The lessons we learned while working to develop a strong partnership with TIARA have helped UASC develop models for working with other community organizations and archives in the Boston area. In the coming year, UASC plans to outline and formalize the various ways we can collaborate with community organizations and record creators in Boston and across Massachusetts, from providing emergency services such as temporary storage, to collaborating on indexing and processing projects in further collaboration with graduate programs in public history and archives at UMass Boston. ■

*This information was shared during the Professional Poster Presentations at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting.*

## Diversifying the Library and Information Science Profession

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the option of creating an online profile that allows them to connect virtually with potential mentors through the “Find Your Ally” portal. With this feature, students are able to search and browse recruiters’ profiles by location, name, or interests. A keyword search for “digital preservation” would reveal six potential mentors for a student to connect with based on that interest. Students also can send direct messages to recruiters or “add them as an ally” for later contact.

Since the program’s official launch in March 2012, more than ten thousand participants at seventy career, education, and cultural fairs across the United States and Canada have been exposed to the profession and approximately three thousand new mentee profiles have been created on the site.

### Essential Information Workshop Series

Building on the momentum of the recruitment fairs, the ALA Office for Diversity recently partnered with several public and academic institutions to coordinate the Essential Information workshop series. Prospective and current LIS students were brought together in Seattle, Chicago, Los Angeles, Atlanta, and New York City to ask questions and learn about graduate education options, funding

opportunities, and career possibilities with professional librarians and archivists. The participants greatly benefited from the wealth of information that was provided through panel discussions, talk tables, individualized assistance, and field trips.

Having the opportunity to connect with a diverse network of peers and mentors helped break down the complexities of the profession and affirmed their desire to pursue librarianship. One participant noted, “I knew I wanted to become a librarian, but after attending the event, hearing the speakers, and meeting with mentors, I’ve never been more determined to actually focus and accomplish that goal.” The professionals also expressed their appreciation for the opportunity to network and collaborate with other local professionals, and for the chance to give back to the LIS community.

### Outcomes and How to Get Involved

An assessment survey conducted in 2013 revealed that most recruiters found the program to be beneficial to their professional and personal development. One recruiter stated, “Being a librarian that doesn’t fit the mold (young and Latina) has been difficult on various fronts, but having the opportunity to serve as a role model and inspiration to future professionals makes the hardships worthwhile. The added boost of confidence has come from interacting with other librarians across library types and geographies, and learning their stories.”

Knowledge Alliance not only highlights the need for more diversity within the profession, it also enhances recruiters’ advocacy skills and builds community among professionals. To raise awareness about the program, recruiters have presented at multiple conferences this past summer, including the 2014 CoSA/NAGARA/SAA Joint Annual Meeting. The session “Young, Black, Brown, and Yellow: Diversity Recruitment Practices from the Field” featured a dramatized recruitment event and showcased marketing materials. After discussing the program’s merits, panelists and attendees engaged in a constructive dialogue about the challenges of recruitment and retention, the current job market, and the importance of serving as ambassadors for the profession. A recap of the session has been made available via Storify ([storify.com/misterbooth/knowledge-alliance-saa14](http://storify.com/misterbooth/knowledge-alliance-saa14)).

While IMLS has extended funding through early 2015, Knowledge Alliance is looking to partner with accredited graduate programs, professional associations, and organizations to ensure longevity and to cosponsor recruitment events. Going forward, the program is looking for more early career professionals, especially those from underrepresented groups, to sign up at [diversity@ala.org](mailto:diversity@ala.org) or [knowledgealliance.org](http://knowledgealliance.org) to become recruiters and mentors. ■

*This information was shared during Session 705, “Young, Black, Brown, and Yellow: Diversity Recruitment Practices from the Field,” at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting.*



**Left:** Jovanni Lota and Daisy Ngo attend job fair in Houston, Texas. **Center:** Essential Information workshop in Seattle. **Right:** Steven Booth and Joy Liu attend the American Historical Association Career Fair. Courtesy of Knowledge Alliance.



## Launching an Essential Records Program

continued from page 11

robust email distribution list of about eight hundred records management contacts. We developed further contacts by approaching associations representing different public body professionals, leagues, local chapters of archives and records management professionals . . . and begging. With this expanded contacts list, we regularly expressed our intentions, marketed the training phases, encouraged forwarding of our emails, and repeatedly thanked the state and local agencies for their partnership with us in this important endeavor.

After each phase of trainings, we released the PowerPoint slides and an audio/video recording of the session. Sharing resources helped keep everyone informed, interested, and on the same page during our Year of Living Essentially. Most importantly, we learned to clearly state the objectives and format of each phase in our marketing materials and to repeatedly restate these points.

### The Four Phases

Phase I, Essential Records Basics, involved a simplified “lite” version of CoSA’s IPER training. We purposely developed a session that involved minimal audience participation and that was repeated six times in January 2013. We had a total attendance of 730 persons during this phase, representing all seven types of public bodies: counties, community colleges, fire districts, municipalities, school districts and charter schools, special districts, and state agencies. Response was overwhelmingly appreciative, enthusiastic, and encouraging.

Phase II, Essential Records Next Round (Town Hall), was designed to be 15 percent training and 85 percent audience participation. The purpose was to review our general retention schedules (GRS) in logical groupings, going records series by records series, and vote on which records series the participants considered essential. We held

ten sessions, targeting a specific audience for each session and relying on experts in the records covered by each GRS to participate in the voting for the corresponding schedules. The marketing for Phase II was tweaked after disastrous evaluations for the first two sessions. We added *town hall* to the name and refrained from using the word *training* since these sessions relied heavily on audience preparation and participation. With this change in marketing, the rest of the evaluations were very favorable. The ten sessions were offered throughout April to June 2013 and had a total participation of 980 persons, again representing all levels of public bodies.

**We believe managing and preserving our essential records is one of the most important challenges we face, but that challenge is often buried under the squeaky wheel of the immediate. Sometimes, circumstances conspire, stars align, and when all is finally right with the universe, we are presented an opportunity to move essential records to the forefront.**

Phase II resulted in our first tool—the Essential Records Voting Tally. We tabulated the votes from each of the ten sessions in an Excel spreadsheet, detailing each records series and the votes for or against essential records status. Public bodies can now use this voting tally as they prepare their List of All Essential Records. By doing so, public bodies can save much of the work required to complete the list.

Phase III, Essential Records Wrap-up, was designed to be 50 percent training and 50 percent participatory. We started with a brief summary of the basic essential

records training, a review of what happened in Phase II, and a rollout of the List of All Essential Records. Phase III provided public bodies with the tools needed to complete their lists. We completed a form for participants to fill out, which includes information about meeting the statutory obligations and optional information regarding records formats and locations (the optional information will be required in the next five-year reporting cycle). Phase III was repeated five times in January 2014, and a total of 380 individuals participated.

Phase IV, Essential Records Follow-up, is being held in late September. It also is 50 percent training and 50 percent participatory and tackles questions such as: Where are you in your essential records list process? What successes, problems, and insights are you encountering in the process? How can we at the LAPR help you meet your goal of completing and submitting a list?

\* \* \*

Our “Year of Living Essentially” has grown into a full-fledged program and has reached more than two thousand state and local agency employees. We have put in hundreds of hours creating the trainings, tools, and guidance. The end product—**Essential Records Program Toolkit**—contains the PowerPoints for Phases I to IV training, the Essential Records Voting Tally, guidance, the List of All Essential Records form, Arizona’s essential records statutes, and our CoSA/NAGARA/SAA Joint Annual Meeting presentation. The Essential Records Program Toolkit is available at <http://apps.azlibrary.gov/files/Share/ListFiles.aspx?id=57c43477-18ef-4b4d-aa4b-e6c40f793b3.3> The password you will be asked for is **98809**.

We hope all our hard work can provide you with the tools you need to launch your own “Year of Living Essentially.” ■

*This information was shared during Session 105, “The Year of Living Essentially: Got Essential Records?” at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting.*



## “La Historia de Mi Familia” continued from page 13

of how to handle a sensitive issue within a community for a community-based project. For this, teachers took the initiative to reach out to parents and to alleviate any concerns raised by them.

### Facing the Challenges

To address these challenges, the structure for the 2013–2014 project was changed to include one additional workshop offered by Noemi Eliassen-Mendez, a staff member of the US Census Bureau who spoke on the uses of the American Community Survey (ACS). She showed students how to tap into ACS data from the 2000s and 2010s. Her workshop focused more on changes in the neighborhood, such as demographic shifts from a white immigrant population in the 1930s to a predominantly Hispanic population in the 2000s, rather than on families.

Regarding the issue of accessibility to recent and foreign records—the project now emphasizes and strongly encourages use of offline resources: their families. Students have discovered a wealth of material, from old photographs to their parents’ and grandparents’ school records.

Last spring the program was dealt an unexpected blow with the closure announcement of the National Archives at Philadelphia’s Market Street location in favor of its Northeast location on March 11, 2014. Faced with finding an alternate exhibit space, Reidell reached out to cultural institutions and found a new partner in the National Museum of American Jewish History. The inclusion of such an institution



**Left:** Kennyshia Paulino, an Esperanza student, speaks at the opening reception hosted by NMAJH on June 4, 2014. **Right:** NARA Archivist Beth Levitt works one-on-one with a student using Ancestry. *Courtesy of National Archives at Philadelphia.*



not only dovetails with their educational programming but the nature of the immigrant experience in America.

Gearing up for its third year, the Esperanza Academy Family History project continues to blaze new ground in educational programming and teaching students about history. ■

*This information was shared during the Professional Poster Presentations at the 2014 CoSA/NAGARA/SAA Joint Annual Meeting.*

## SAA Welcomes Five New Fellows continued from page 22

team member for a number of the library’s pioneering digital projects, including the California Heritage Collection, an online archive of more than thirty thousand images illustrating California’s history and culture, and the Japanese American Relocation Digital Archives, which provides documentation of the experience of Japanese Americans in World War II internment camps.

In 2004, while working at the Research Libraries Group (RLG), Proffitt was part of a team that authored the *RLG Best Practice Guidelines for Encoded Archival Description*, a guide that went on to receive the 2004 C.F.W. Coker Award from SAA. “This important initiative in archival description, which involved a two-continent collaboration, would never have come together without [Proffitt’s] knowledge, energy, enthusiasm, and diplomatic skills,” one supporter wrote.

In her current role at OCLC Research, Proffitt leads the research project Mobilizing Unique Materials, an initiative that seeks new collaborative methods that will allow the unique materials found in libraries, archives, and museums to be “effectively described, properly disclosed, successfully discovered, and appropriately delivered.” In the process of shaping and executing this initiative, she’s authored papers on the scholarly and teaching impact of digitizing collections, as well as organizing events that help shape a new professional point of view, such as the conference Past Forward! Meeting Stakeholder Needs in 21st-Century Special Collections.

**Frederick J. Stielow**, vice president and dean (emeritus) of libraries, electronic course materials, and ePress for the American Public University System (APUS) earned master’s degrees in history and library and archival science, as well as a dual doctorate in American studies and history at Indiana University. He went on to accrue more than thirty years’ experience as an educator, consultant, and manager in archives and related fields. His managerial experience is diverse; in one of his first professional positions, Stielow served as

head of archives and special collections at the then University of Southwestern Louisiana, a major center for the revival of the Cajun and Creole heritage. Later in his career, he headed Wayne State University’s Walter Reuther Library, the country’s premier labor archives repository with a staff of twenty-five.

In 2004, he was solicited to build a virtual library as part of regional accreditation efforts at APUS, a virtual university serving 100,000-plus students in more than 120 countries. In less than a decade, Stielow grew collections from 20,000 volumes and 8,000 serials to 170,000 ebooks and multiyear runs of 53,000 journals. Access increased by 3,000 percent and searches now exceed 100,000,000 annually. These efforts resulted in his recent selection as the American Library Association’s (ALA) 2014 Distance Librarian of the Year.

Stielow has been an active member of SAA for thirty years, serving on the ALA/SAA/American Alliance of Museums Committee on Archives, Libraries, and Museums; the Harold T. Pinkett Minority Student Award Committee; and the ALA–SAA Joint Committee. ■



Beth Shields

### Emerging Leader Award

**Beth Shields**, the electronic records analyst at the Kentucky Department for Libraries and Archives (KDLA), and an electronic records consultant for CoSA, is the 2014 recipient of the Emerging Leader Award. Created in 2011, the Emerging Leader Award celebrates and encourages early career archivists who have completed archival work

of broad merit, demonstrated significant promise of leadership, performed commendable service to the archives profession, or have accomplished a combination of these requirements. In her work at KDLA, Shields works to improve Kentucky's electronic records management policies and procedures. Her contributions help to ensure that Kentucky government records will be properly managed and preserved, regardless of format. As the co-chair of CoSA's State Electronic Records Initiative, Shields provides insight and coordination for this large and important collaborative project that has far-reaching implications for electronic records and digital preservation in all state and territorial archives.

## Writing and Publishing

### C.F.W. Coker Award



Béatrice Skokan, University of Miami Manuscripts and Outreach Librarian

The **Remixing Archival Metadata Project (RAMP)** by the University of Miami Libraries is the recipient of the C.F.W. Coker Award. The team members who worked on this project are: Tim Thompson, Matt Carruthers, Andrew Darby, David Gonzalez, and Jamie Little. The C.F.W. Coker Award recognizes finding aids, finding aid systems, innovative development in archival description, or descriptive tools that enable archivists to produce more effective finding aids. Over

the years, the archives community has produced a body of detailed biographical descriptions that support access to the broader social and historical context surrounding archival and special collections. The emerging archival authorities format, EAC-CPF (Encoded Archival Context—Corporate Bodies, Persons, and Families), provides a framework for encoding those descriptions and establishing a dialog between librarians and archivists regarding name authority control. The RAMP editor is a web-based tool for generating and disseminating EAC-CPF records. The RAMP editor successfully brings together librarians and archivists with a diverse range of skills around a project with a singular goal: to make descriptive work more accessible to the public by making archival description dynamic and reusable.

### Waldo Gifford Leland Award

**Ellen Gruber Garvey**, an English professor at New Jersey City University, is the 2014 recipient of the Waldo Gifford Leland Award for her book, *Writing with Scissors: American Scrapbooks from the Civil War to the Harlem Renaissance*, published by Oxford University Press. The Waldo Gifford Leland Award is given for writing of superior excellence and usefulness in the fields of archival history, theory, and practice. *Writing with Scissors* provides an engaging narrative on the role of newspaper clippings scrapbooks as archival records that transcend lines of race, politics, gender, and class. Garvey contextualizes the keeping of these scrapbooks as a way for marginalized people to tell their history. As scrapbook makers reused free books and blank scrapbooks to create and manage their own personalized texts, they claimed ownership of their reading matter and constructed counter-narratives to their portrayals in the press. By reading scrapbooks against new technologies for managing newsprint, Garvey encourages archivists to view scrapbooks as “direct ancestors of digital information management.”



Ellen Gruber Garvey

### Preservation Publication Award



Grace Lile and Yvonne Ng

**Activists' Guide to Archiving Video**, a website created and edited by the archivists at WITNESS, an international organization that trains and supports people using video in their fight for human rights, is the winner of the Preservation Publication Award. Published in 2013, the website focuses on preserving digital video, an area in which there is still little published guidance. Available freely online in three languages, the guide is organized into eight sections that focus on stages in a video archiving workflow: create, transfer, acquire, organize, store, catalog, preserve, and share. Unlike other resources, it is aimed at content creators rather than archivists, enabling interventions that support preservation early in the digital lifecycle. The guide also uses easy-to-understand language and low-cost recommendations that empower individuals and grassroots organizations with fewer resources to take action to safeguard their own valuable collections. WITNESS staff Grace Lile, the director of operations, and Yvonne Ng, senior archivist, accepted the award. ■



## FROM THE EXECUTIVE DIRECTOR

Nancy P. Beaumont

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# FY 2014 Year in Review

*The following report was presented at the Annual Membership Meeting of the Society of American Archivists in Washington, DC, on August 16, 2014.*

It is my pleasure to provide a summary report of SAA's activities in Fiscal Year 2014. The Strategic Plan for 2014–2018 that the Council adopted in January served as the framework for the Society's priorities and work plans throughout the fiscal year.

### **Goal 1.1. is to promote the value of archives and archivists to various audiences.**

SAA doesn't have a million dollars or more a year to spend on a lobbying firm or paid advertising or PR counsel or additional staff. But we now have two volunteer groups dedicated to promoting the value of archives and archivists to various audiences and educating decision makers about the importance of archives and archivists. The Committee on Advocacy and Public Policy (CAPP) is concerned with influencing public policy decisions of government at all levels. The brand-new Committee on Public Awareness (COPA), created in May, is focused on influencing opinions among the general public and stakeholder groups other than legislators and regulators. The two committees will collaborate to ensure a coordinated approach to SAA's priorities and communications. COPA met for the first time in mid-July and, as you'll soon be seeing everywhere, SAA members are COPA's number-one target audience.

CAPP's current focus is on preparing briefs and talking points that address issues outlined in SAA's Advocacy Agenda. In FY 2014, the Council adopted well-thought-out and well-presented issue briefs on the Presidential Records Act, FOIA, and, in collaborations between CAPP and the

Intellectual Property Working Group, Orphan Works and Section 108 of the Copyright Act. At this conference the Council adopted a brief on the Health Information Portability and Accountability Act developed in collaboration with the Science, Technology, and Health Care Roundtable, and in the works is a joint statement—with the Council of State Archivists and the National Association of Government Archives and Records Administrators—on ensuring adequate funding of government archives and archival programs.

Bill Maher, past president of SAA and current member of the Intellectual Property Working Group, represented SAA steadfastly and well at two sessions of the World Intellectual Property Organization's Standing Committee on Copyright and Related Rights, placing SAA at the international table on critical copyright issues.

SAA's Education Department worked with content experts David Carmicheal and Jelain Chubb to offer at *ARCHIVES \* RECORDS 2014* a very low-cost, full-day preconference workshop on advocating for archives, and we hope to make available a webinar on the topic in the fall. Projects for FY 2015 include development of an advocacy toolkit, in collaboration with several component groups, and provision of additional practical resources on the website.

As you'll hear from incoming SAA President Kathleen Roe in a few minutes, the linchpin to progress toward Goal 1 will be widespread member involvement in promoting and advocating for archives and archivists. You are your legislators' constituent. You have the most direct access to your users and resource allocators. You are the most

important medium because you're in the best position to carry forward a compelling message based on your knowledge and passion for what you do. SAA's job is to craft plans and messages and provide low-cost, low-barrier tools and training for you to use in your own advocacy efforts.

### **In working toward the third priority within Goal 1—that is, providing leadership in ensuring the completeness, diversity, and accessibility of the historical record:**

- SAA published *Through the Archival Looking Glass: A Reader on Diversity and Inclusion*, edited by Mary Caldera and Kathryn Neal.
- The Diversity Committee issued a call for case studies on Diversifying the Archival Record and sponsored a forum on the topic at this annual meeting.
- And the Council will set aside a few hours at its November 2014 meeting to have a “mega issue” discussion about what SAA might do to address this priority.

### **Goal 2 is all about providing content, via education and publications, that reflects the latest thinking and best practices in the field—via methods that are accessible, affordable, and keep pace with technological change.**

To that end, we implemented 112 face-to-face courses and workshops during the year, serving the needs of 2,729 attendees. Eighty-eight of those courses were related to SAA's Digital Archives Specialist (DAS) curriculum. We now have 835 individuals pursuing a DAS certificate and 89 individuals who have been awarded a DAS certificate. The numbers are kind of staggering, really. . . .



DAS isn't the only game in town, of course. The Committee on Education has also completed revisions and updates of four popular non-DAS courses and has under development two webinars—one on records management for archivists and one on EAD 3—and a new Council-approved curriculum on arrangement and description.

On the publications front: *Trends in Archives Practice* is SAA's new open-ended series of modules featuring brief, authoritative treatments that fill significant gaps in archival literature. Each module deals with a discrete topic relating to the practical management of archives and manuscripts in the digital age. The modular approach enables SAA to be more agile in the development phase and to provide the information in "chunks" at an affordable price. As the modules are developed, readers are encouraged to mix, match, and combine them in ways that best meet their needs. Nineteen modules are now in various stages of production.

In addition, Publications Editor Chris Prom and the Publications Board have begun implementation of a plan for publishing the Archival Fundamental Series III.

2014 also saw publication of *Conceptualizing 21st-Century Archives* by Anne Gilliland.

And, of course, in FY14 we convened again in New Orleans, this time to celebrate the city's renaissance since our 2005 visit, and we did lots and lots of planning for *ARCHIVES\*RECORDS: Ensuring Access*—our largest annual meeting ever!

**Every professional association is—or should be—in the business of advancing the profession it serves. That concept is addressed in the specific subset of ideas captured in Goal 3.**

To address identifying the need for new standards, guidelines, and best practices and leading or participating in their development:

- SAA developed *Best Practices for Internships as a Component of Graduate Archival Education* (adopted in January 2014) and

- *Best Practices for Volunteers in Archives* (adopted by the Council at this meeting). These guidelines serve to clearly define the relationship between volunteers and archival organizations to provide a more positive and rewarding experience for all parties.
- The Committee on Ethics and Professional Conduct recently issued a call for ethics case studies that will assist members in their professional growth.
- The Standards Committee's technical subcommittee on Encoded Archival Description will soon issue EAD 3, and the Archival Facilities Guidelines technical subcommittee is hard at work on a revision of that important set of guidelines.

Our long-standing professional journal *The American Archivist* is at the top of the list of the ways in which SAA fosters and disseminates research, and Editor Greg Hunter and the Editorial Board continue to publish the best and the brightest. In the category of no good deed goes unpunished, though: In early April we received a termination notice from MetaPress, the hosting service since 2007 for *The American Archivist Online*. We've assembled a group led by Paul Conway to find the best possible alternative to MetaPress to ensure uninterrupted—and, we hope, improved—access to the electronic version of the journal.

For the past few years, the Journal Editorial Board has hosted lively brown bag lunch discussion groups to explore a forthcoming and provocative Journal article. Two such groups met in New Orleans and again during this conference.

Participation in SAA's Research Forum has increased each year since its inception in 2007, thanks to the efforts of Nancy McGovern and Helen Tibbo, and this year more than 150 people were preregistered for it. Each year many of the presentations are published on SAA's website as proceedings of the Forum.

And we've seen a steady increase in participation by Annual Meeting presenters in posting their materials on the conference

website. Please encourage speakers to send in their materials!

We're attuned, perhaps more than ever before, to the importance of "relevant partnerships and collaborations"—and it's becoming more natural and, well, automatic for us to think in these terms. Our efforts in FY14 with external organizations focused on this Joint Annual Meeting (a true collaboration of the three sponsoring organizations) and on formation of two new joint task forces with the Rare Books and Manuscripts Section of the ALA: One on Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries and the other on Standardized Statistical Measures for Public Services.

Somewhat loosely related to this goal is the work of the Dictionary Working Group, which has been engaging the professional community in identification and development of new terminology and review of existing terms in the process of building the new *Dictionary of Archives Terminology*. I hope that you've noticed—and maybe participated in—Word of the Week, which premiered on July 23. More than seven hundred subscribers already have signed up for the weekly e-blast.

**The strategies laid out for Goal 4 are challenging, beginning with facilitating effective communication with and among members.**

We've been busy improving access to many of our communication vehicles based on the excellent recommendations of the Council-appointed Communications Task Force:

- The new mobile design of our biweekly e-newsletter *In the Loop* has been well received by readers. Both open rates and click rates are the highest they've ever been and, according to Mail Chimp, our open rates are well above average!
- Last winter we launched the digital edition of *Archival Outlook*, making it easier to share the newsletter's content. At the same time, we removed the embargo of recent issues; *Archival Outlook* is now open to all when it's published. So pass it along!

- Matt Black, our tech guy, has continued to refine our Sched.org-based conference website and this year launched a native app for the conference that we hope you've found useful.
- As I mentioned, more than seven hundred individuals already have subscribed to the Word of the Week email blast.
- And work on redesigning the website continues, with a goal of completing it early in calendar year 2015.

**Work to create opportunities for members to participate fully in the association has taken on several forms:**

- The Council adopted a Code of Conduct originally proposed in the spring by two SAA members. The Code is intended to create a safe space for members and others as they participate in SAA meetings, events, and online spaces.
- The Council charged a Task Force on Member Affinity Groups to look into options for strengthening affinity groups to ensure that they allow for member participation and meet member needs.
- We explored child care options for this conference to ensure opportunities for parents to attend and participate. We'll be looking into co-op and other options for Cleveland next year.
- To make SAA annual meeting content more accessible to members, we posted audio recordings of past conferences from 2006 to 2012, making them freely available, and we negotiated provision of MP3 downloads of this conference for just \$30—considerably more reasonable than the \$149 for CDs in past years.

**And we have worked to enrich the association and profession with greater diversity in membership and expanded leadership opportunities:**

- Via the IMLS-funded Mosaic Program in conjunction with the Association of Research Libraries. You've heard about the five Mosaic Fellows in the current cohort

and I hope you've had a chance to interact with them at this conference.

- We continued to provide the Mosaic and Forman scholarships and the Pinkett Minority Student Travel Award.
- And Kathleen Roe's process for appointing individuals to various boards and committees for the coming year gave careful attention to the need to continue to include diverse voices.

## On the Operations Front

We dedicated time and resources to ensuring a successful Annual Appeal for the SAA Foundation, resulting in the largest-ever yield from the appeal. The new Foundation Development Committee began drafting both short- and long-term goals for fundraising, and the Finance Committee began work on granting guidelines. You'll be hearing a lot more from the Foundation in FY15!

As SAA Treasurer Mark Duffy will describe, FY 2014 was a remarkably successful year financially. Participation in the DAS program and in the 2013 Joint Annual Meeting far exceeded our expectations, even as book sales continued to decline. We ended the fiscal year with 6,179 members, just 10 shy of our highest month in FY 2014. But the big news, in case you missed it in the run-up to this conference, is that as of July 30, SAA membership totaled 6,224, the highest in our history!

What makes me especially proud of that number is that it's not due to the actions of any one person or group. It's due to SAA sections and roundtables that are connecting with their members through good communication and innovative activities. It's due to committees and boards and working groups that are developing products and services, issue briefs, and standards. It's due to a Council that is willing to wrestle with big issues like jobs and diversity and to lay out a strategic plan. And it's due to SAA's twelve staff members, who are completely committed to this organization's success. . . .

We're just scratching the surface of SAA's very ambitious strategic plan. When I look at our membership and financial numbers, when I hear the ideas of our committees on public awareness and standards, Publications and Editorial Boards, Business and RAO sections, Issues and Advocacy and SNAP roundtables, I'm convinced that we're on our way to achieving the goals set out in the plan.

As is my tradition, I'd like to say a few words about the four Council members who are retiring today.

**Terry Baxter:** Baxter, Baxter, burning bright. . . . Your unique world view keeps us on our toes. Just when I think that I know what you're going to say on an issue, you tap into a well-reasoned contrarian view that inevitably surprises me. I hope you keep surprising all of us. . . . See you in Portland!

**Elisabeth Kaplan:** Brilliant and fashionable Beth Kaplan, passionate advocate for excellent, technology-based communication, transparency, and seeking member input on all matters, thank you! And thanks for helping me keep things in order. . . .

**Bill Landis:** Bill Landis, aka Pogonippy, who has the unique ability to think really, really big and the willingness to dig into the finest details. Our unmatched liaison to component groups—it's not a coincidence that Bill's assigned groups are among the most active and productive. To Bill, our Intelligentsia addict, thank you!

**Danna Bell:** And Danna Bell—she of kind heart, amazing ability to synthesize and cut to the proverbial chase, and uncanny knack for keeping meetings running on time—thank you, Danna!

We hope to be working with all of you on SAA's strategic issues—the Strategic Plan that you all developed—for a long time to come.

It is my privilege to serve as SAA's executive director and I thank you for the opportunity to address you today. ■

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